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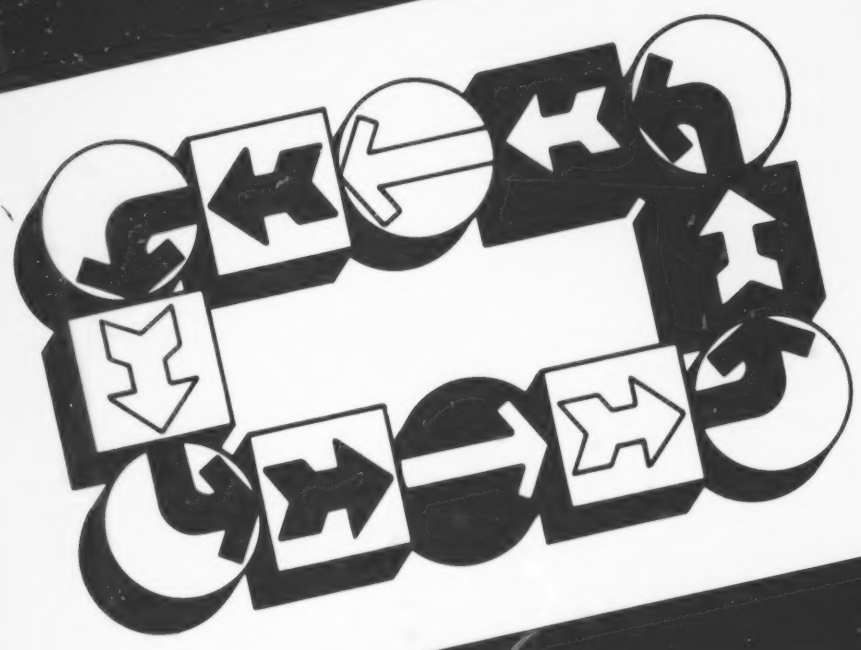
ABSTRACT

This module, one in a series of performance-based teacher education learning packages, focuses on a specific skill that vocational educators need to create appropriate learning environments and to plan and manage instruction that is well-suited to the learning and psychological needs of today's adults. The purpose of the module is to help the teacher take part in planning and carrying out a marketing effort for an adult education program. Introductory material provides terminal and enabling objectives, a list of resources, and general information. The main portion of the module includes five learning experiences based on the enabling objectives: (1) develop a plan for gathering local market data; (2) demonstrate knowledge of the development of a program description; (3) demonstrate knowledge of the steps and strategies for recruiting adult students; (4) critique the program description and recruitment plan; and (5) develop a follow-up plan. Each learning experience presents activities with information sheets, samples, worksheets, checklists, and self-checks with model answers. Optional activities are provided. Completion of these five learning experiences should lead to achievement of the terminal objective through the sixth and final learning experience that requires (1) an actual teaching situation in which an adult education program can be marketed, and (2) a teacher performance assessment by a resource person. An assessment form is included. (YLB)

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Market an Adult Education Program

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FOREWORD

This module is one of a series of over 130 performance-based teacher education (PBTE) learning packages focusing upon specific professional competencies of occupational instructors (teachers, trainers). The competencies upon which these modules are based were identified and verified through research as being important to successful teaching. The modules are suitable for the preparation of instructors in all occupational areas.

Each module provides learning experiences that integrate theory and application; each culminates with criterion-referenced assessment of the instructor's performance of the specified competency. The materials are designed for use by teachers-in-training working individually or in groups under the direction and with the assistance of teacher educators or others qualified to act as resource persons. Resource persons should be skilled in the teacher competencies being developed and should be thoroughly oriented to PBTE concepts and procedures before using these materials.

The design of the materials provides considerable flexibility for planning and conducting performance-based training programs for preservice and inservice instructors, as well as business-industry-labor trainers, to meet a wide variety of individual needs and interests. The materials are intended for use by local education agencies, postsecondary institutions, state departments of education, universities and colleges, and others responsible for the professional development of instructors.

The PBTE modules in Category N—Teaching Adults—are designed to enable adult instructors to create appropriate learning environments and to plan and manage instruction that is well suited to the learning and psychological needs of today's adults. The modules are based upon 50 competencies identified and verified as unique and important to the instruction of adults.

Many individuals have contributed to the research, development, field review, and revision of these training materials. Appreciation is extended to the following individuals who, as members of the DACUM analysis panel, assisted National Center staff in the identification of the competency statements upon which this category of modules is based: Doe Hentschel, State University of New York at Brockport; David Holmes, Consortium of the

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The National Center for Research in Vocational Education's mission is to increase the ability of diverse agencies, institutions, and organizations to solve educational problems relating to individual career planning, preparation, and progression. The National Center fulfills its mission by:

- Generating knowledge through research.
- Developing educational programs and products.
- Evaluating individual program needs and outcomes.
- Providing information for national planning and policy.
- Installing educational programs and products.
- Operating information systems and services.
- Conducting leadership development and training programs.



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The National Institute for Instructional Materials
120 Driftmier Engineering Center
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Direction is given by a representative from each of the states, provinces and territories. AAVIM also works closely with teacher organizations, government agencies and industry.

**MODULE
N-2**

Market an Adult Education Program

Module N-2 of Category N—Teaching Adults
PROFESSIONAL TEACHER EDUCATION MODULE SERIES

The National Center for Research in Vocational Education
The Ohio State University

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INTRODUCTION

What does marketing an adult education program mean to you? Selling the program? Marketing is more than selling. An effective marketing program is consumer-oriented rather than product-oriented. It involves—

- assessing the market—finding out who the consumers are and what they want;
- planning and developing products—in this case, adult education programs—in response to the market;
- determining the best way to package, promote, and distribute each program to reach the consumers; and
- carrying out the promotional program to recruit students.

Or does marketing suggest negative images to you? Does it mean going out and finding students to fill the classroom? something that you do to save a program threatened by cancellation due to low enrollment? huckstering? Unfortunately, particularly in public secondary-level institutions, marketing has had a poor image. There were ample secondary students to serve, the audience was a captive one, and having to sell the value of education was considered unnecessary—if not undignified.

Attitudes are changing, however, and for good reason. Changing enrollment patterns and the rapid pace of technological change have created new

educational audiences, and institutions are discovering the need to market their programs to serve and attract these audiences.

This module is designed to help you take part in planning and carrying out a marketing effort for an adult education program. *This does not necessarily mean that you will be the chief marketer; your role will depend very much on your circumstances.*

For example, if you are hired to teach a continuing education course on a given topic to be offered two weeks from now, you probably will not be doing much direct marketing—at least, not right away. If you are considering expanding your present program or trying to reach a new segment of the market, you will certainly need to use marketing techniques. If you are a trainer in an industry-based program, your role will depend on the policies of the industry and the training agency.

Whatever your situation may be, the marketing of the programs with which you are associated must necessarily be a broad, continuing effort. It is becoming increasingly clear that, as an instructor, **you** must be involved in that effort. This module describes many contributions you can make, according to your particular circumstances, to the marketing of an adult education program.



ABOUT THIS MODULE

Objectives

Terminal Objective: In an actual teaching situation, market an adult education program. Your performance will be assessed by your resource person, using the Teacher Performance Assessment Form, pp. 73-75 (*Learning Experience VI*).

Enabling Objectives:

1. After completing the required reading, develop a plan for gathering local market data pertinent to your occupational area (*Learning Experience I*).
2. After completing the required reading, demonstrate knowledge of the purposes, content, and guidelines for development of a program description (*Learning Experience II*).
3. After completing the required reading, demonstrate knowledge of steps and strategies for recruiting adult students (*Learning Experience III*).
4. Given a marketing base synopsis, program description, and recruitment plan, critique the program description and recruitment plan (*Learning Experience IV*).
5. After completing the required reading, develop a follow-up plan based on information provided in a given case situation (*Learning Experience V*).

Prerequisites

To complete this module, you must have knowledge of the characteristics of adult learners and the process of adult development. If you do not already meet this requirement, meet with your resource person to determine what method you will use to do so. One option is to complete the information and practice activities in the following module:

- *Prepare to Work with Adult Learners*, Module N-1

Resources

A list of the outside resources that supplement those contained within the module follows. Check with your resource person (1) to determine the availability and the location of these resources, (2) to locate additional references in your occupational specialty, and (3) to get assistance in setting up activities with peers or observations of skilled teachers, if necessary. Your resource person may also be contacted if you have any difficulty with directions or in assessing your progress at any time.

Learning Experience I

Required

A resource person to evaluate your plan for gathering local market data.

Optional

An instructor of adults, experienced in marketing, whom you can interview concerning sources of market information.

Learning Experience II

Optional

Sample program descriptions, developed for other adult education programs in your area, that you can review.

Learning Experience III

Optional

An instructor of adults, experienced in marketing, whom you can interview concerning recruitment strategies that are successful with adults.

References: The National Center for Research in Vocational Education. Professional Teacher Education Module Series; Category G: School-Community Relations (10 modules). Athens, GA: American Association for Vocational Instructional Materials, 1978.

Learning Experience IV

No outside resources

Learning Experience V

No outside resources

Learning Experience VI

Required

An actual teaching situation in which you can market an adult education program.

A resource person to evaluate your competency in marketing an adult education program.

General Information

For information about the general organization of each performance-based teacher education (PBTE) module, general procedures for its use, and terminology that is common to all the modules, see About Using the National Center's PBTE Modules on the inside back cover. For more in-depth information on how to use the modules in teacher/trainer education programs, you may wish to refer to three related documents:

The *Student Guide to Using Performance-Based Teacher Education Materials* is designed to help orient preservice and inservice teachers and occupational trainers to PBTE in general and to the PBTE materials.

The *Resource Person Guide to Using Performance-Based Teacher Education Materials* can help prospective resource persons to guide and assist preservice and inservice teachers and occupational trainers in the development of professional teaching competencies through use of the PBTE modules. It also includes lists of all the module competencies, as well as a listing of the supplementary resources and the addresses where they can be obtained.

The *Guide to the Implementation of Performance-Based Teacher Education* is designed to help those who will administer the PBTE program. It contains answers to implementation questions, possible solutions to problems, and alternative courses of action.

Learning Experience I

OVERVIEW



Enabling
Objective

After completing the required reading, develop a plan for gathering local market data pertinent to your occupational area.



Activity

1

You will be reading the information sheet, Establishing a Marketing Base, pp. 6-14.



Optional
Activity

2

You may wish to meet with an instructor of adults in your institution or agency who is experienced in marketing to determine what local sources have yielded valuable market information.



Activity

3

You will be using the Marketing Base Worksheet, pp. 15-16, as a guide in developing a plan for gathering local market data pertinent to your occupational area, including sources of information and types of information to be obtained.



Optional
Activity

4

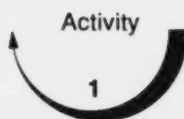
You may wish to begin a resource file of individuals and organizations that are potential sources of market information in your present local area and occupational service area.



Feedback

5

Your competency in developing a plan for gathering local market data pertinent to your occupational area will be evaluated by your resource person, using the Marketing Base Checklist, pp. 17-18.



A well-researched marketing base is crucial to a successful marketing campaign. To learn more about the elements of a marketing base and how to establish one, read the following information sheet.

ESTABLISHING A MARKETING BASE

Marketing. Selling. Promotion. Recruitment. Advertising. Publicity. Public relations. There are many terms related to marketing that cause confusion because they are used differently by different people and because they do, in fact, overlap in scope and meaning. So to be sure we have a common base of understanding, let's begin with a few definitions—that is, how the terms are used in this module.

Selling. Although some people still equate this term with marketing, it actually refers to a very small part of educational marketing. Selling implies that first you have a product (a course or program in this case) and then try to find buyers (students). However, effective program development and marketing does the reverse: it begins with the needs and wants of the potential students and creates programs to meet them.

Promotion. Promotion involves getting the word out about the program—both **where** it will reach the intended audience and **in a way** that will interest them. Put another way, promotion is an exercise in information, persuasion, and influence. It includes publicity, advertising, personal selling, and other selling tools.

Recruitment. Recruitment is the process of getting students to enroll for the course or program. Recruiting students is generally the aim of the promotional efforts.

Publicity. Publicity involves getting factual information out to the public about your organization and your program. Publicity may relate directly to your program, or it might be part of an ongoing effort to acquaint the public with your organization and what it is trying to do. Publicity can include news coverage, press releases and conferences, public service announcements, and other means of reaching an intended audience.

Advertising. Advertising includes paid-for white space (in print media) and air time (on radio and TV) and other promotional efforts designed to make people aware of and attracted to your program.

Public relations. Public relations activities are those designed to generate goodwill and to enhance the image of your organization and program and its relationships with the media and the public. (Of course, there are more cynical definitions of public relations, or PR, but we will hold to this more positive meaning.)

Marketing. Marketing is all of these things and more. It involves promotion, publicity, public relations, advertising, and selling. It also involves learning about your market (potential students), planning and developing programs to satisfy that market, and "packaging" your program to reach the right people, at the right time, for the right price.

With these definitions in mind, let us consider the need for establishing a marketing base.

The Need for a Marketing Base

A marketing base is a body of information about your target audience that enables you to tailor your program to the needs of that audience and to attract and retain members of that audience as students.

Information about your audience is absolutely vital to successful educational programming. You could design a truly fine program—well conceived, taught with competence and flair—and have it flop if you ignore the importance of assessing the market needs. In other words, you can do a great job at the wrong task unless you find out what **the audience** wants and needs.

To be able to plan and promote your program effectively, you will need to answer such questions as the following about the market:

- Who are the potential students and what are their characteristics?
- To what extent are they currently involved in adult occupational education?
- What is their opinion of adult occupational education, and how can you improve this image and dispel any misconceptions?
- What types of programs would appeal to them?

- What barriers do they have to participating in adult education programs?
- What types of program packaging (e.g., supportive services, flexible policies) would appeal to them?
- How and where can they be reached to inform them about the program?
- What types of promotional devices do they respond to?
- What is the labor market situation in your occupational area?

In short, you will need information about three major areas: (1) the local labor market, (2) the potential students—what types of programs people in the adult market need and want and the barriers that impede their participation in further education and training, and (3) the institutional supports—services and policies—that could help alleviate those barriers and provide incentives to participation.

If you are responsible for providing training for members of your own organization (e.g., a business or industry), you will have to consider a number of additional marketing issues. Internal marketing (see sample 1) involves not only prospective students, but also key decision makers within your organization.

Labor Market Trends

The labor market has a direct bearing on program planning, since occupational programs should prepare students for real employment opportunities. Neither the community, the students, nor your program will be well served if students complete occupational programs only to find that there are no jobs. You need to be aware not only of the present situation but of trends for the future, employment projections, and local developments that affect the job market.



For example, what are the employment needs in the local community? Where are the jobs? How does the supply of workers compare with the demand in the different occupations? What plants have closed, leaving workers out of work?

How has technology affected the need for retraining or upgrading? Are workers being "replaced by machines"? Are workers finding their skills outmoded by new generations of equipment? Are high-tech industries growing faster than the labor force can handle? How well satisfied are local employers with current job applicants?

What is the predicted future for local industries? Is a new industry moving in or an old one moving out? Are mergers in the wind, major government contracts expected, or growth in the service industries foreseen? The answers to questions such as these can be very helpful in targeting programs to meet the community's needs.

The Prospective Students

Adult students, unlike their younger counterparts, are not a captive audience. They are often time-conscious, and they learn what they consider to be important. They will enter a program that promises to meet their needs, and they may not stay if it turns out not to fulfill that promise. Therefore, you need to learn as much about them as you can.

Training needs and wants. Adults may join an adult education program for a variety of reasons, including these and others: training, retraining, job maintenance, upgrading, professional development, professional certification/licensing, intellectual curiosity, avocational interests, or retirement needs.

To attract adults to your program, you will need to have information about their goals. What are their training needs, and what do they want out of adult occupational education? What other types of continuing education or special-interest programs do prospective students want?

The **needs** and the **wants** of potential students, while related, are not necessarily the same thing. They may or may not have training needs that coincide with what they want to pursue. Some needs are recognized, others are not. Thus, you need to determine both what kinds of training, retraining, upgrading, or certification courses people in your market need, as well as what kinds of training they want. With an adult audience, if they don't want it (and if they have a choice), they probably won't take it.

SAMPLE 1

INTERNAL MARKETING

The marketing strategies and tactics discussed in this module will work equally well whether applied internally or externally. Whether your target audience consists of fellow employees or adults in the community matters little—they are all prospective learners.

But prospective learners are only one factor in the internal marketing equation. If you don't do an effective job of marketing training or education programs to your organization's key decision makers, you won't be successful. You must gain acceptance of and approval for your programs from the individuals who control the organization's resources—its people, time, and money.

The strategies and tactics for marketing to decision makers should focus on individuals rather than groups. This is not to say that you should ignore organizational goals and objectives. These, too, are important factors. You must consider the outcomes of any training or education program in terms of how they will affect the organization. But they must also be considered in light of the personal characteristics of key decision makers—especially their value systems and personal needs.

Decisions about whether a training or education program will be supported are often made on the basis of perceived value to the decision maker. If the decision maker feels that a particular training program will improve the functioning of, say, the customer service department and that the improved performance will reflect favorably upon him or her, then support for that program is much more likely to be forthcoming.

The decision maker often doesn't think in terms of the product (the training program) itself—but rather, what the outcomes of "buying" that product are likely to be.

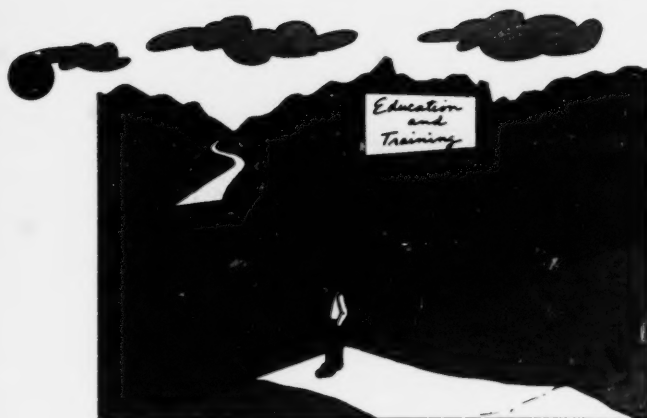
Looking at a different arena may help clarify the idea. A lawmaker may create an elegant piece of legislation—well-written, well-designed, and needed. In and of itself a worthy product. However, if this legislation is not perceived as providing some valuable outcome, either by constituencies or other lawmakers, then it will collect dust on the shelf of its creator.

Your job in marketing programs internally, then, is first to try to understand the thinking of key decision makers and then to tailor your presentation or proposal to them. Put yourself in their shoes, look through their eyes, and determine what you would think of your training program—how it might benefit specific areas of the organization, the organization as a whole, and you as a decision maker (with the responsibilities that come with the power to decide).

Besides the decision makers, other individuals in your organization are also essential to successful marketing of your products. These are the people who have power or influence—people whose opinions are valued and who understand the inner workings of the organization.

If you develop good working relationships with these individuals, you can enlist their aid a lot more easily when you need a well-placed, favorable comment about your program. A support base of influential people will pay dividends, both in terms of marketing to key decision makers and marketing to your target audience.

Remember, the brightest ideas, the most elegantly designed training program, or the most well-thought-out curriculum will not be successful if it isn't effectively marketed.



Barriers. In addition, adults often face barriers to enrolling in an educational program. For example, do your prospective students have **scheduling** barriers? Perhaps a full-time day job makes attendance at evening or weekend classes necessary. Perhaps workers on one shift find it difficult to take part in an industry training program offered in conjunction with another shift.

Do they have barriers related to **personal needs**? For example, do they require financial help, transportation, or day care for their children? Do they have poor basic skills or study skills, requiring remedial or supportive services? Do they have language or cultural barriers requiring other accommodations?

Some adults have **attitudes** that constitute barriers. Some have a poor self-concept and may doubt their potential for learning. This can affect their willingness to give adult education a try. For people fearful or hesitant about returning to school, a complicated registration process, for example, could make them run the other way. On the other hand, an arrangement allowing them to try the program before committing themselves could actually encourage their participation. Do adults in your market need extra incentives and encouragement to enroll, or support services to continue in the program?

Preferences. You will also need to know what other factors play a role in what makes educational programs attractive to prospective students. For example, what times and locations do they prefer? What types or styles of training (e.g., seminars, lectures, hands-on workshops, self-guided learning) do they like, and what turns them off? How much are they able or willing to spend for adult education?

Location of audience. Finally, you will need to locate the people you are trying to reach. Analyze the neighborhood—where do they live, where do they gather? What organizations do they belong to? Where do they shop? What newspapers, magazines, newsletters, or journals do they read? What parts of the paper do they read? What radio/TV programs do they turn on?

Institutional Supports

Knowing what barriers people have to participating in adult education programs (e.g., children, jobs, medical problems, lack of transportation, poor basic skills, poor language skills, fear of the school situation) is not sufficient. You also need to determine what support services or accommodations you can offer through either your institution or the community to minimize those barriers.

The following are examples of support services and accommodations offered by adult education programs to facilitate participation:

- Day care for children
- Flexible scheduling
- Open-entry/open-exit policies
- Financial aid
- Transportation to and from the program
- Location of the program in areas with high concentrations of potential students
- Remediation of basic skills concurrent with other training
- English-as-a-second-language/limited-English-proficiency (ESL/LEP) programs
- Time or stress management counseling
- Personal counseling
- Career information and counseling
- Assistance with job placement and referral
- Test taking and study skills training
- Adult student organizations
- Adult support groups

What supportive services do your institution and community presently offer? It makes sense to begin with the supports that are already in place and available and then to use your ingenuity to expand on them. There are often other creative steps an individual instructor can take to minimize barriers, encourage students, and otherwise make it easier for them to participate in an adult program. Not the least of these is one-to-one human interaction and support of the prospective or new student.

With a solid base of information about labor market, students, and institutional supports, you will be better able to **package** your program properly—that is, to arrive at the right combination of the following elements:

- Content and focus
- Timing and schedule
- Location
- Price
- Support services
- Incentives

How to Establish a Marketing Base

Establishing a marketing base, as done by professionals in the field of marketing, is not a simple task that can be covered in a single information sheet. However, as an adult educator, there are some fairly straightforward steps you can take to identify (1) who the people are that make up your market and (2) what prevailing conditions will have an impact on whether they become your students.

Basically, there are three major steps in obtaining the information you need:

- Define the market (narrow the field)
- Segment the market (break it up into manageable pieces)
- Set up a market information system (establish linkages that will help you to learn more about those pieces)

Naturally, the scope of this process will vary according to the situation. It may, for example, be simple and easy to manage the process for a single course on a specific topic for which there is a readily identifiable audience. For an entire adult education program for a large community, however, the process may be more difficult to manage. As an instructor, your task is likely to be closer to the former than the latter, since the latter normally falls to a professional in educational marketing.

Nonetheless, the principles hold for small or large efforts. In either case, the purpose is to ensure that a marketing base established when the program is new will have value later as your marketing involvement grows.



Define the Market

Who are the people your program is intended to serve? In defining your market, you need to distinguish among those who are already users (i.e., current students), those who have the potential for becoming students, and those who are not likely ever to become students in your program.

If you are seeking to develop a new program or array of programs to meet whatever needs may exist in the community, your market may be the entire adult population. More often, the market is limited in some way:

- By an **existing topic** (Example: You currently teach a secondary-level course on automated office procedures, and you hope to modify that course to serve as an upgrading program for adult office workers with outmoded skills)
- By the **mission** of your organization (Examples: Your agency is dedicated to providing saleable skills to unemployed welfare recipients; to improving literacy skills; to serving the needs of retired individuals, or minorities, or immigrants; to addressing the professional needs of women)
- By the **context** in which the program is offered (Example: You are an industrial trainer whose client is a labor organization in the building trades)
- By the **occupational area** (Example: In your field of health care, you wish to develop a seminar dealing with geriatric issues; your market would necessarily be those in the various health fields)
- By **geography** (Example: Your institution serves a designated area, such as the county, or it is simply impractical for students to come from very far away)

Segment the Market

When you have identified your market—those who are potential students—it is often helpful to segment that market. Segmenting a market means breaking down a large, diverse group into smaller groups with common characteristics. Segmenting the market can make it easier to reach the potential students within each group, by enabling you to do the following:

- Channel money and effort effectively to the best markets

- Design programs that really match market demands
- Determine what promotional appeals will be most effective
- Choose advertising media more intelligently
- Time promotional efforts so they are heaviest when response is apt to be at its peak

An adult market can be segmented according to many different factors. For example:

- **Age**—By virtue of being an adult audience, your market is already somewhat segmented by age. But it can be broken down still further (e.g., young adult, middle-aged, retirement-aged).
- **Sex**—Your program may be aimed at males or females or both. There may be gender-related channels for reaching both segments of the audience.
- **Family life**—A person's family situation (e.g., young singles, young couples without children, young couples with children, older couples with children, single parents, older couples whose children are grown, older singles) may affect his/her interest in your program.
- **Geographic distribution**—Urban, suburban, or rural location may be a useful way to designate potential audiences if it affects their interest level or your means of reaching them.
- **Other personal factors**—Such factors as race, religion, nationality, education, or occupation may be pertinent to your marketing effort. For example, for an English-as-a-second-language program, nationality would be a key factor.

Set up a Market Information System

In order to market your program effectively, it is very important to have your finger on the pulse of the community's needs. Market information cannot be gathered once and put on file. Because people and situations are constantly changing, you need to tap sources continually and systematically—hence a market information **system**. An effective market information system is operated on a continuing rather than sporadic or intermittent basis.

Market information must also be future-oriented. That is, you will need to look not only at what programs historically have satisfied the market or what kinds of training have been needed in the labor market, but what the trends are—what has promise for the future.

To aid in systematizing your information gathering, it is helpful to **develop a resource file** of individuals and organizations you regularly contact. Each source can be put on a separate card, which includes such data as the following for each entry:

- Name
- Address
- Phone
- Type of business, organization, occupation, agency, etc.
- Type of information available
- Date last contacted

Kept in a rotary card file, such entries can be used as a part of a tickler system, reminding you to renew contacts and get the latest updates. New entries can be added easily to this kind of file.

You can extend your capacity for information gathering if you **collaborate with others** who have a common interest, such as colleagues, an advisory committee including employers and community representatives, or similar group. Just as you have people and organizations that you keep in touch with, newsletters and journals that you read, and meetings that you attend, so will each person with whom you collaborate.

Often in a single meeting, a group can coordinate a market information system for your organization—chart your present resources, specify a schedule for systematically tapping those resources and reporting back to the group, and identify any major gaps in the system that need to be filled. Each member of this group then becomes a minisystem, representing a whole range of secondary sources. By touching base with each one, you in fact gain access to many sources of current market information that will help you in your program planning and promotion.



Sources of Information

In obtaining market information, nothing is more important than establishing and maintaining **linkages**—within your organization and with the community at large. The linkages available to you will vary according to your situation and your area of specialty. However, in most cases the possibilities are almost as many and as varied as the direct and indirect contacts one has with other human beings.

The following are examples of internal and external linkages available to many adult educators. The list is not exhaustive, nor does every resource apply to everyone. As you examine your own situation, you are likely to find that many sources (these or others) already exist for you, and that a variety of others can easily be developed.

Internal Linkages

Within your own organization, there are apt to be valuable sources of information about the potential student market. The sources will vary with the type of organization and in what they offer. Some may provide input on client needs, others on existing support services you can tap. The following are some potential sources to which you may have access.

Marketing and distributive education (MDE) staff. In a school setting, the MDE staff is a likely source of market information. They may have information already available from previous studies or surveys, or they may be able to help you select appropriate techniques for obtaining information pertinent to your occupational area.

Public relations (PR) staff. PR people make it their business to know the public and the support services offered by the institution.

Counselors. The guidance and counseling staff within your institution may be able to advise you on such matters as the types of problems and barriers students commonly have, available services to which they can be referred, and training areas in which there is apparent interest.

Media. House organs and newsletters have mailing lists, and staff may be able to share profiles they have developed of their readership.

Admissions offices. Some admissions offices will make available, for education-related purposes, mailing lists of current students and alumni. They may also have information on such matters as financial aid, registration procedures, past program offerings (both successful and unsuccessful), and so on.

Training departments. In business and industry, training departments sometimes survey employees about their training interests and needs. They may also have information about past and current trainees, changing trends in job structures or company organization, and so on. If you offer customized training programs for business/industry/labor (BIL), development of a close, cooperative relationship with each client will not only be crucial, but it will enable you to tap these information sources to help develop your marketing base.

External Linkages

It is very important to involve the community in all aspects of your marketing effort, from information input and assessment to reporting, monitoring, and evaluation. The market assessment stage is a very good place to start creating those relationships.

Depending on your training situation, the following types of sources may be able to provide information about your market. The key in each case is to set up a systematic program for tapping the source, whether it be a contact person you see regularly on a formal or informal basis, or a planned program of calling, reading, visiting, or otherwise checking up on the latest developments.

It is also good to remember that **personal contact** with individuals (whether former students or local employers) is by far the most profitable method of obtaining up-to-date and relevant local information. For each of the organizational sources that follow, the personal touch—a visit or phone call, a conversation before or after a gathering, a discussion over lunch—invariably forms a better basis of communication than sending an impersonal letter or reading secondhand information.

Training or advisory committees. Committees involving local employers, as well as educators, are an excellent source of up-to-date information about labor market and training trends. While these committees are a standard part of secondary-level programs, they may be overlooked in adult programs. Regular meetings of such committees can provide the framework for systematic information gathering, as well as less formal brainstorming about community training needs.

Job services. Job services, placement services, and employment agencies are another excellent source of labor market information. A well-run job service should have information on unemployment, labor supply and demand, and the overall training picture in the local area.

Local government and service agencies. Socially oriented agencies dealing with programs concerned with public assistance, aid to dependent children, public health, poverty, human rights, and related issues may be good sources of information about barriers to participation, needed support services, and similar information. The Office of Economic Development in the governor's office is another good source of information about emerging labor trends and service-oriented programs in the local area.

Chambers of commerce. Local chambers of commerce prepare materials about companies and organizations operating in the area and are a rich source of economic data. They often have results on file of surveys they have done among the local employers, which may relate to educational or training issues, employment trends, and other pertinent matters.

Community organizations. Involvement in Kiwanis, Rotary Club, Jaycees, Lions Club, Optimists, various guilds, PTAs and similar groups provides opportunity for personal contact with a real cross-section of the community—adults of all shapes and sizes, potential students, employers, agency workers, government personnel, community leaders, and so on.

Other outside agencies. Organizations related to your field of study, occupational area, or specific target audience may keep abreast of labor market trends.

BIL. Business/industry/labor (BIL) linkages are a must when you are preparing students for employment. BIL contacts—either professional or casual, that you already have or could establish—can keep you abreast of local developments that affect the labor market.

BIL linkages may be with individual people and specific companies or through BIL-related organizations, such as manufacturing associations, industrial professional and trade organizations, industrial development commissions, private industry councils, and so on. BIL-prepared reports and promotional materials are another excellent source of local information.

Other training providers. Competitors in the field of training in your area are a very important source of information. Adult education is a vast field, and there is a great deal of competition for students. Secondary and postsecondary institutions; continuing education divisions of higher education institutions; adult basic education programs; community-, county-, and federally sponsored programs; professional programs; customized industry training programs; and many other types of adult education coexist in many communities and compete in the same market.



It makes sense to know who the competition is, what programs they offer, and who their students are. Contact and cooperation among providers of training can also help to ensure that the needs and wants of the community are met in a balanced way and that support services are available without unnecessary duplication.

Sources for identifying other trainers include educational and technical journals; conferences and media/materials fairs, training directories in the library, catalogs in guidance offices, and the Yellow Pages of your telephone directory.

Data reports and data banks. Data published by the U.S. Census Bureau are sometimes helpful in learning more about a target audience. Data on employment and training on a broad geographic basis are available through the National Occupational Information Coordinating Committee (NOICC) and its state-level counterpart, SOICC. The job bank at the state job services also has general information.

Your own community surveys. You can design surveys to find out public opinion about adult education and training—what kinds of training people want and need, degree of interest in selected topics, barriers to participation, and so on. Some adult educators have had excellent results in developing such surveys and conducting them in public meeting places, such as shopping malls or libraries.

Journals. Regularly reviewing technical or professional journals related to your field is a good way to stay informed about currently popular training programs, successful instructional strategies for adults, the efforts of other trainers, and other matters. Articles in adult education journals often provide ideas about how to reach prospective audiences, hassle-free registration systems, and the nature of the adult market in general.

Local news media. Readership (or viewer/listener) surveys conducted by newspapers (or TV/radio stations) can give you some idea of what sections of the paper (or programs) your target groups prefer. In addition, reading newspapers and tuning in news programs regularly is a good way to keep up-to-date on life in the community: news events, meetings, gatherings, issues, trends, policies, governmental workings, advocacy groups, social agencies—the list could be endless.

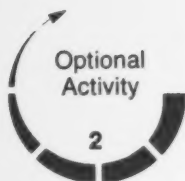
Students. People currently enrolled in other programs are an excellent source of information about their own needs, wants, and interests. They can also tell you how they heard about their current program. As a source of information, they have the advantage of being available and of having demonstrated an interest in adult education. Former students are another excellent source.

This is only a sampling of the many types of sources of information you can use to learn more about your market. The sources that are appropriate

for you will, of course, depend on the nature of your program, and you will need to determine what combination of sources and strategies will be most effective for you.

As you define and segment your market and then learn as much about your market as you can, you put yourself in the position of being able to cater to the needs and wishes of that market as you establish the marketing base for your program. With such a base, you will be better able to accomplish the following:

- Develop the program in such a way that it meets the needs of the market
- Package the program so that it is appealing and accessible to the target audience
- Promote the program in such a way that you reach the right people with the right information at the right time



You may wish to meet with an instructor of adults in your institution or agency who is experienced in marketing to determine what local sources have yielded valuable market information. You could structure your discussion around such questions as the following:

- What internal and external sources have yielded useful information?
- What information sources have proved less productive than expected?
- What have been the best sources of market information?
- What provisions have been made for tapping sources systematically?
- Are there types of market information that have not been readily available?



Activity

3

Using the following worksheet as a guide, develop a plan for gathering information on the local adult education market for your occupational area, including the sources of information and types of information to be obtained.

MARKETING BASE WORKSHEET

Part I: Market Definition and Segmentation

Define your adult education market. Identify any segments within that group that you can use in your marketing base.

Market:

Segments:

Part II: Sources and Types of Information

Internal Sources

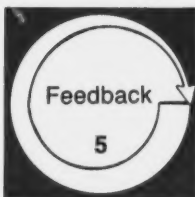
Types of Information to Be Obtained

External Sources:

Types of Information to Be Obtained



You may wish to use the results of your market information plan to begin a resource file of individuals and organizations that are potential sources of information in your present local area and occupational service area.



After you have completed your market information plan, arrange to have your resource person review your plan. Give him/her the Marketing Base Checklist, pp. 17-18, to use in evaluating your work.

MARKETING BASE CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

Name _____
Date _____
Resource Person _____

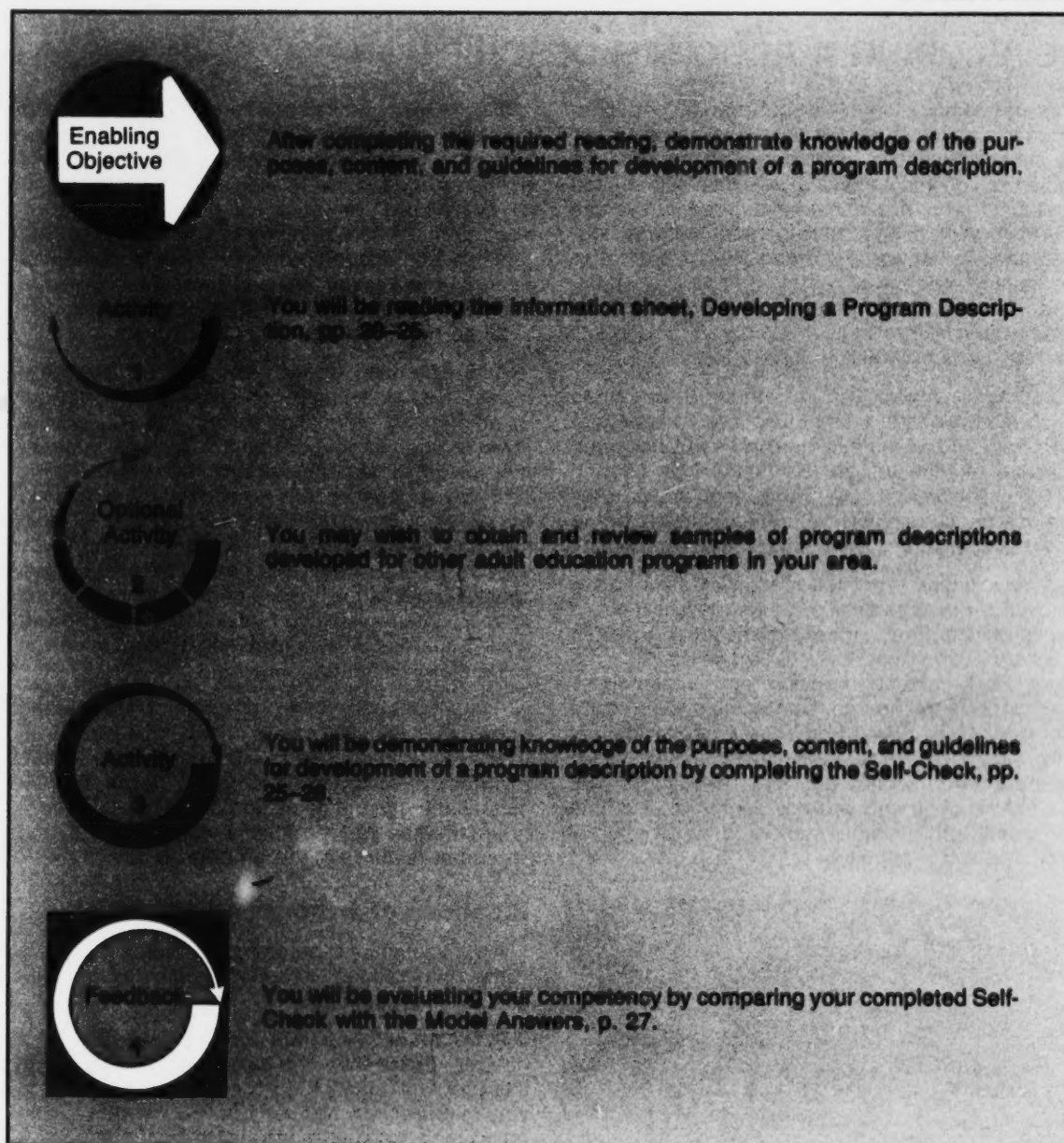
LEVEL OF PERFORMANCE

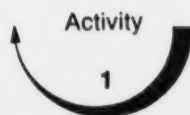
	N/A	No	Partial	Full
1. The adult market was:				
a. specifically identified	☐	☐	☐	☐
b. appropriate for the program	☐	☐	☐	☐
2. The market segments were:				
a. specific	☐	☐	☐	☐
b. homogeneous	☐	☐	☐	☐
c. appropriate for the program	☐	☐	☐	☐
3. The plan included means of obtaining information about:				
a. the local labor market	☐	☐	☐	☐
b. prospective students (e.g., needs and wants, barriers to participation, preferences, location)	☐	☐	☐	☐
c. institutional supports needed	☐	☐	☐	☐
4. The plan included use of both internal and external sources of information	☐	☐	☐	☐
5. The external sources of information included:				
a. students	☐	☐	☐	☐
b. BIL	☐	☐	☐	☐
c. employment-related organizations or agencies	☐	☐	☐	☐
d. social or community organizations	☐	☐	☐	☐
e. other trainers in the area	☐	☐	☐	☐
f. journals and news media	☐	☐	☐	☐
g. community surveys and data banks	☐	☐	☐	☐
6. Sources for obtaining information about each market segment were identified	☐	☐	☐	☐
7. The sources selected appear likely to yield the type of information sought	☐	☐	☐	☐

Level of Performance: All items must receive FULL or N/A responses. If any item receives a NO or PARTIAL response, review the material in the information sheet, Establishing a Marketing Base, pp. 6-14, revise your plan accordingly, or check with your resource person if necessary.

Learning Experience II

OVERVIEW





Developing a program description is an important step in planning and marketing an adult education program. For information on how to develop a program description and what to include, read the following information sheet.

DEVELOPING A PROGRAM DESCRIPTION

Once you have identified your market, set up an information system, and used it to assess the labor market and the needs and preferences of your target audience, you should have quite a lot of information available to you. At that point, you are ready to use your marketing base to develop and **package** your program. In other words, you can begin to customize the training program so that it works for the intended audience—so that it attracts adult students, interests them in enrolling in the program, and meets their needs once in the program.

Packaging is what you put around a product to catch the buyer's eye and make the product more marketable. For example, there are many good and effective toothpastes on the market. By offering toothpaste in an attractive, convenient, and easy-to-use pump-type container, a manufacturer hopes to convince consumers to select its particular product.

But packaging is not just window-dressing to sell an already-developed line of goods—in this case, an educational program. Ideally, it should be a part of program design from the very beginning. Program design and marketing function rather like the proverbial chicken-and-egg combination—you can't really say which comes first. You will need to market the program you are designing, and you must design the program in such a way that it will, in fact, be marketable. You can see how important it is that packaging and eventual marketing be an integral part of program planning.



It is not really important where you, as an instructor and marketer, come into this process. Whatever your entry point—whether at the very conception of a program idea or perhaps taking over or expanding an existing program—the fact remains that you will need to make sure that you have students for the program and that the program meets the students' needs. To do so, you will need to use the knowledge you have gained about the market in order to provide the right packaging for the program.

And it certainly doesn't end there. If you were careful in establishing your marketing base, you set up an ongoing information system that will not shut down as soon as your program is in place. Information you obtain through that system in the future will probably suggest changes that need to be made in the program to ensure that it will continue to meet students' needs. Students will change, their needs will change, their wants will change, the employment situation will change, the program content may need to be updated to stay current with the field. So you should guard against considering a program design to be static or permanent.

A very important step in program planning—and one that will help you to stay on top of your program as it evolves and changes—is to develop a written **program description**. A program description indicates the general goals and purposes of the program, the general instructional areas covered, and important features of the program.

Purposes of a Program Description

A well-developed program description serves a variety of purposes, both in its actual development and its later usefulness.

Program development. The act of developing a program description can help you to think through the program planning process. For example, in writing a program description, you will be seeking answers to such questions as who your prospective students are, what their needs are, and how your proposed program can help to meet those needs. These are some of the same questions you must ask as you design the course and develop a more complete course of study.

Program promotion. A written description of your program will be a vital part of your promotional program. It can be a help when you seek institutional support for customizing registration procedures, scheduling, or locating classes to meet the needs of adult students. You will need a written description when you approach publicity representatives or the media, and it can be used as a checklist when you write copy for promotional pieces.

Program evaluation. A written description gives you a basis for evaluating the program in the future. For example, is the program in fact as you described it, or has it evolved into something else? Does the program serve the goals it was designed to serve? Does it still meet the needs of the target audience? Does the current audience have the same needs as the audience for whom the program was originally conceived?

What to Include

A program description, as noted earlier, includes the following:

- General goals and purposes of the program
- General instructional areas covered
- Important features of the program

The goals and purposes of a program evolve from the goals of the institution (e.g., school, college, business, industry) and of the overall occupational program area. In preparing your statement of goals, you need to be sure they are consistent with those of the broader entity. This can be especially important when an institution seeks to expand its services.

For example, your institution's original mission may have been to serve secondary students or "continuing students"—those entering a postsecondary institution immediately following high school graduation. But now you want to expand the institution's services to include adult students, "returning students." Spelling out the goals of the new program can help you ensure that they are not achieved at the expense of the original goals of the institution.

The instructional areas and important features of the program can best be described by answering the following questions: Who? What? Where? When? How? Why?

Who is to be taught? Is your program designed for high school graduates? displaced homemakers? unemployed or underemployed adults? workers in a specific occupational area? management-level employees of a specific company? This information may also include some experience or training prerequisites, aptitudes, or physical requirements that may become part of your program description.

What are they to be taught? What occupation, or part of the occupation, will students be taught? What are the major skill or content areas to be covered, and what degree of skill are students to attain? Put another way, what will they be able to do when they complete the program that they could not do before?

Where will the new knowledge and skill be used? In what job situations will the work ultimately be performed or the new abilities be useful? And what is the employment environment? For example, is the work primarily "hands-on" work, dealing with equipment or products? Is it "head" work, dealing with numbers, ideas, abstractions, or data? Is it "people" work, dealing with clients, customers, or co-workers? Or is it some combination of these? Are physical conditions (e.g., temperature, noise level, outdoor setting) a factor?

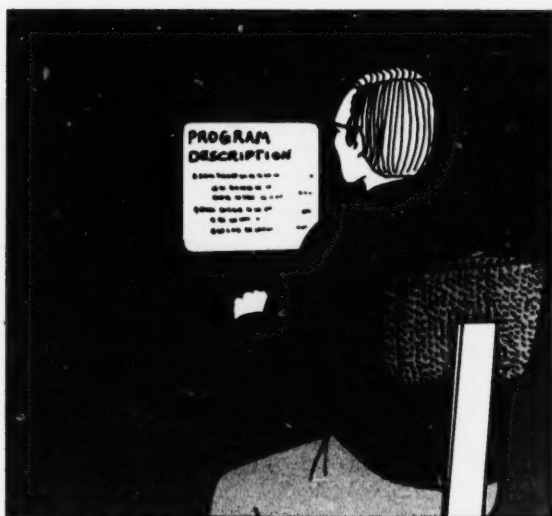
When is the program offered? When does the program begin, and how long does it last? When are classes scheduled? Is there flexibility in the schedule? Are alternate times available? Is the schedule especially convenient for people who have full-time jobs, who are on nine-month contracts, or who work the night shift?

How will the program be taught? Is the program conventional, competency-based, self-paced, or computer-based? Is it a seminar or workshop? Is small-group interaction or independent study a major element? Are field trips planned? Will students have input into the approaches used? These can be very important aspects of a program. How the program is taught can make the difference in whether the program meets the needs of particular students—and whether the right students are attracted to it.

Why should students enroll in this program? This might also be phrased, What else? What else is there about the program that makes it attractive, desirable, saleable? Within this category fall all the support services and accommodations for special adult needs.

You should also take stock of the services and benefits (e.g., financial aid, placement assistance, and health services) to which enrollment entitles the student. There may also be some "extras" that are especially appealing, such as access to sports and recreation facilities, eligibility for a day-care program, or low-cost health insurance.

Structural characteristics—such as open-entry/open-exit, easy registration process (telephone or credit card), "try it first, register later" arrangements, special scheduling, and especially convenient location—may also be selling points. Data regarding the success of past program completers or the number of job openings per year may also add appeal.



How to Present the Information

There is no single acceptable format for a program description. Depending on the type of institution, the type and magnitude of the course or program, and the ways you intend to use the program description after it is developed, you might opt for either narrative or outline form.

You can arrange the information according to the six questions (who, what, where, when, how, why) or some other logical arrangement that serves your purposes better. Perhaps your institution has a standard format to be followed. Sample program descriptions are provided in samples 2 and 3.

Format aside, there are a few guidelines for developing a program description that will be useful in marketing.

Be accurate. Get the facts—don't rely on intuition or guesses. Base your content on verified occupational tasks and topics, not hunches or personal

preferences. Do your homework; if you don't know, find out: Are counseling services really available to noncredit adult students? Is the outreach location really within reach of the bus line? Are there actual job openings in the local area for this occupation, or might students need to relocate after training?

All this may sound pathetically obvious. Unfortunately, examples abound of program descriptions characterized by inaccuracies, exaggerations, or just wishful thinking. Don't promise what you can't deliver, and always base your fact-finding on sound procedures.

Be clear. Simple, direct language serves best in a program description. Avoid complex constructions; vague or repetitive language, jargon, and highfalutin terminology. The description should be as clear to someone outside your field as to an expert.

Be brief. This is closely related to being clear. Very often a description becomes unnecessarily long because the writer doesn't have a clear enough understanding to come right to the point. If you have trouble making your program description short and sweet, you may need to reexamine the course content. It may be too vague or loosely organized to be of value.

Focus on what is important. A program description is not a detailed course outline. Identify the key points of the content and the most important packaging features for the intended audience. What is most interesting, vital, exciting, important to know, or otherwise marketable about your program?

Be interesting. Who can say what makes a program description interesting? It all depends on who is reading it. But a description that is dull, repetitive, uninformative, sloppy, or without a point leads one to expect the same of the program itself. If you approach the adult education program with enthusiasm, put that same enthusiasm into your program description.

SAMPLE 2

SAMPLE PROGRAM DESCRIPTION A

- I. **Title of Program**
External High School Diploma Program
- II. **Name of Division/Bureau/Unit**
Bureau of Community and Continuing Education Program Services
- III. **Contact Person and Phone Number**
Neil Carr (518) 474-8942
- IV. **Description of Program**
The External Diploma Program is an alternative high school diploma program, using a competency-based format instead of the accumulation of Carnegie credit units currently required. The program assesses and certifies life competencies as the basis for awarding local high school diplomas. Each candidate must successfully undergo an individualized assessment in addition to demonstrating 64 generalized competencies organized into three categories: occupational/vocational skills, specialized skills, and advanced academic skills. The program is available at eight sites (Niagara Falls City Schools, Yonkers City Schools, Great Neck School District, Long Beach City Schools, Patchogue-Medford School District, St. Lawrence-Lewis BOCES, Rensselaer-Columbia-Greene BOCES, and Auburn Correctional Facility) to adults over 16 who do not possess a high school diploma, but who have achieved an 8th grade level in reading and/or mathematics.
- V. **Funding Source(s)**
Adult Education Act, Title XIII, Section 310
- VI. **Application Procedures**
Request for applications are made to public school districts and BOCES. In 1981-82, competitive applications were received and rated.
- VII. **Resource Publications**
New York State External High School Diploma Program: An Alternative Life Skills Credentialing Program by Judith A. Alamprese and Norma S. Feldman, Syracuse Research Corp., November 1980.

SOURCE: *New York State Education Department Programs for Adults* (Albany, NY: The University of the State of New York, The State Education Department, Office of Adult Learning Services, 1982), p. 4.

SAMPLE 3

SAMPLE PROGRAM DESCRIPTION B

Questions and Answers for the Customized Job Training Program

What is the Customized Job Training Program?

The Customized Job Training (CJT) Program is a state initiative that provides funds to train employees in specific skills to meet an individual employer's needs. All companies that create new jobs in Pennsylvania through an expansion of their existing operations or by a new business start-up are eligible to receive CJT assistance. Persons being trained automatically receive a job with the company if they successfully complete training.

What types of training programs are eligible for funding?

There are three basic types of training eligible for funding:

- Entry-level training that provides individuals with specific skills necessary to work in a position that has been created as the result of a new business start-up or the expansion of an existing business
- Upgrade training that provides existing employees with the skills necessary to adapt to new or altered technology as a result of a major equipment purchase or related capital expansion
- Upgrade training that provides existing employees with the skills necessary to advance to a higher position within the business, which in turn creates vacant entry-level positions that will be filled by hiring new employees

How do businesses receive CJT funds?

The company must apply through a local educational agency, which includes area vocational-technical schools, school districts, intermediate units, community colleges, licensed private and proprietary trade and business schools, and state universities.

What training costs can be supported by CJT funds?

In general, CJT funds can be used for the following:

- Instructor salaries and benefits
- Consumable materials and supplies
- Rental of tools and equipment
- Travel
- Overhead costs

Is the business required to contribute support to the training program?

No. However, business contributions such as employee salaries, equipment, space, etc., are strongly encouraged.

Is the business required to pay trainees a wage during the training period?

If the goods and services produced by the trainees in on-the-job training programs are sold by the business for a profit, the business must pay the trainees. In all other training situations, the business is not required to pay a wage during the training period.

Where can training be conducted?

The business can select the most appropriate site for training. Training can be conducted at the business's own facilities, at the local educational agency, at a rented facility, or at a combination of sites that best meets the employer's needs.

Who does the paperwork?

Each CJT program is administered by a local educational agency, which is responsible for preparing the project budget and application for funding. The training plan is also developed by the local educational agency in conjunction with the business to ensure that trainees obtain the exact skills necessary to perform at peak efficiency.

Who teaches the trainees?

Program instructors can be either current full- or part-time educators or experts from the business.

Who selects the trainees?

The selection of trainees is the responsibility of the business. The local educational agency and the Office of Employment Security are available to provide assistance in recruiting potential trainees and conducting initial screening of potential trainees if the business so desires.

The business is also responsible for establishing criteria (such as educational and skill level) used to select trainees and for determining which trainees successfully complete the training program. The business must make a commitment to hire all individuals who successfully complete the training program.

Are there any restrictions in the CJT Program?

- CJT funds will not be granted if there are adequately skilled individuals available in the local labor market who could fill the entry-level positions.
- Funds for CJT programs are granted within the Commonwealth's fiscal year, which is July 1 to June 30. Therefore, two applications for funding must be submitted for training programs that go beyond the end of the Commonwealth's fiscal year.
- The intent of the CJT Program is to support short-term training. Therefore, training programs should not be longer than six months in length. (Exceptions can be made to the six-month period, but the maximum period is one year.)
- The application for funding must be submitted to the appropriate regional field office at least five weeks prior to the start of training.
- Funds cannot be used to pay wages or stipends to the trainees.

What does the local educational agency do?

The local educational agency will develop the training plan with the business, package the grant application, oversee the delivery of the training program, and handle all fiscal arrangements.

How are applications approved?

All applications are submitted to the appropriate Regional Vocational Education Field Office for initial review. If the application meets the program's requirements, it is forwarded to the Department of Education in Harrisburg for review by an Interagency Task Force. While the task force recommends approval or disapproval of the application, the final approval rests with the Department of Education. The approval process generally takes five to eight weeks from the time the application is submitted to the Regional Vocational Education Field Office.

SOURCE: Pennsylvania Department of Education, Bureau of Vocational Education, Economic Development Support Section.



You may wish to obtain and review samples of program descriptions developed for other adult education programs in your local area. As you review them, take note of the different formats and styles used, and consider how effectively each serves the purposes of a program description.



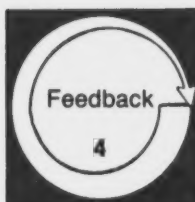
The following items check your comprehension of the material in the information sheet, Developing a Program Description, pp. 20-25. Each of the three items requires a short essay-type response. Please explain fully, but briefly, and make sure you respond to all parts of each item.

SELF-CHECK

1. What would you say to someone who says that "packaging" a program is just a way of selling education to people who may neither want it nor need it?

2. How does a program description relate to program packaging?

3. How might a program description for an adult program differ from one aimed at secondary or continuing postsecondary students?



Compare your written responses to the self-check items with the model answers given below. Your responses need not exactly duplicate the model responses; however, you should have covered the same **major** points.

MODEL ANSWERS

1. This statement ignores one of the main purposes of packaging—to customize training to meet the needs of the consumer.

Ideally, packaging should be a part of program design. By identifying, as a part of the marketing base, the needs, wants, preferences, and barriers to participation of prospective students, program developers then are able to provide the required content, approaches, and supportive services.

Packaging thus makes a program marketable. That is to say, it helps ensure that the program will in fact be what people need and want—and therefore buy.

2. A program description presents the goals and purposes of the program, the instructional areas covered, and the important features of the program. The elements of program packaging—the ways the program is tailored to the needs of the students—are an important part of the content of a program description.

The questions you must ask yourself in developing a program description (who, what, where, when, how, and why) can help you to think through program packaging. They help you focus on who your market is and what the market needs.

3. A program description for an adult program is likely to differ from that for a program for secondary or continuing postsecondary students more

in emphasis than in content. Both will include the same basic information: goals, purposes, instructional areas covered, and important features. However, they may be quite different because what is “important” in one setting is not necessarily so in the other.

For example, location, scheduling alternatives, transportation, and child care might be less critical issues in a program aimed at secondary or continuing postsecondary students than in one aimed at returning adults.

Instructional approaches are important in any program. However, it may be crucial to adults that, for example, selection of classroom and field activities is made in cooperation with students. Or that educational outcomes vary according to students’ individual goals. Or that instruction is competency-based and self-paced. Therefore, these features would need to receive greater emphasis in the program description.

Structural characteristics, such as open-entry/open-exit or delayed registration, might also be important features to include in a description of an adult program.

The point to be made is that whatever factors are determined to be most important should receive the greatest emphasis, and this often varies with the nature of the target population.

Level of Performance: Your written responses to the self-check items should have covered the same **major** points as the model answers. If you missed some points or have questions about any additional points you made, review the material in the information sheet, *Developing a Program Description*, pp. 20–25, or check with your resource person if necessary.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

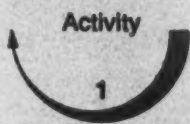
Learning Experience III

OVERVIEW



Enabling
Objective

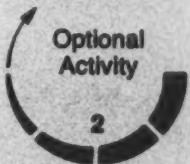
After completing the required reading, demonstrate knowledge of steps and strategies for recruiting adult students.



Activity

1

You will be reading the information sheet, Recruiting Adults, pp. 31-47.



Optional
Activity

2

You may wish to meet with an instructor of adults in your institution or agency who is experienced in marketing to discuss recruitment strategies that have been successful.



Optional
Activity

3

To gain more skill in using promotional techniques effectively, you may wish to refer to the PBTE modules in Category G: School-Community Relations.



Optional
Activity

4

You may wish to develop one or more promotional pieces about a course or program you are currently teaching.



Activity

5

You will be demonstrating knowledge of steps and strategies for recruiting adult students by completing the Self-Check, pp. 49-50.



You will be evaluating your competency by comparing your completed Self-Check with the Model Answers, pp. 51–52.



Recruiting students is one of the most visible and more rewarding parts of marketing an educational program. For information on steps and strategies for recruiting adult students, read the following information sheet.

RECRUITING ADULTS

The initial stages of marketing are preparation stages—planning, getting information, analyzing, developing a program description. Finally, this is where the real fun begins: recruiting students—getting them to enroll by promoting the program.

Of course, nothing is that simple. Recruitment isn't just now beginning; it actually had its beginnings back when you were establishing a marketing base, determining who your target audience is and what they are like, and breaking that audience down into potentially **reachable** groups.

Nor does recruitment end with enrolling students. You must also be concerned with retaining them. That means there needs to be a good fit between the learners' needs and wants and what the program has to offer. Sometimes it means that **change** has to occur:

- People need to become aware of the program.
- People need to recognize their need or desire for what the program offers.

- Some people need to overcome barriers—physical ones (e.g., lack of money or transportation) or attitudinal ones (e.g., fear of school, hostility toward education in general or occupational education in particular).
- These people need to realize that some of the traditional barriers have been diminished or eliminated (e.g., the program has been designed with adults in mind, without the old authoritarian trappings of education).

Through your promotional efforts, you can be an agent of change for these students. Through a well-conceived, well-targeted, and personalized recruitment program, you can reach out to the right people, with the right information, and with an approach that demonstrates that you know who they are and how to help them over the hurdles.

Develop a Recruitment Plan

To ensure that your recruitment program is well conceived and systematically carried out, you need to develop a recruitment plan, based on the demands of your situation. One way to develop such a plan is to use the following five steps:

1. Establish your role
2. Determine your assets
3. Analyze the program for promotional potential
4. Determine the promotional mix
5. Set up a schedule

Developing a plan using these steps will help you to target your efforts effectively. In addition, it will help ensure that your time and energy will be efficiently spent—that you will get the greatest possible amount of promotion for the available resources.

Establish Your Role

The extent to which enrollment depends on recruitment efforts and the extent of your own involvement in program promotion will, as we have said, depend on your situation.

In industry training, for example, the success of the program may indeed depend on recruiting voluntary participants from the company ranks. Or participation in the program may be mandatory for employees. Or participation in training may be necessary for promotion—a motivation for employees to enroll. (Even when recruitment is unnecessary, promotion is sometimes used to create goodwill for the program, so that it is viewed as an opportunity rather than an obligation.)

You may be in an educational institution that has an established marketing arm, with whom you need to coordinate your own limited recruitment efforts. Or you may teach in a program where each instructor is largely responsible for recruiting his or her own students. Or, responsibility aside, perhaps you feel that your course is just not reaching the people who really need it, and you want to expand your audience to include them.

Thus, your first task here is to establish your role. What is **your** role in recruiting students, and what are your responsibilities? Who is in charge? Who else is involved? How do the roles relate? If you are in charge of promotion for one or more programs, the "buck" will stop with you. You may delegate what you can to a committee of hard-working, responsible people, but you will need to make the final decisions, and you will need to check every detail to be sure that promises are kept.

If you are working under the guidance of a publicity/promotional person or committee, you should meet with the person in charge to define your exact responsibilities. Whenever more than one person is involved in promotion and recruitment, it is vital that their efforts be coordinated, to save time and money and avoid confusion.

Determine Your Assets

The first thing that usually comes to mind in the way of assets is **money**, and indeed that can be an important factor. Is there funding for recruitment, and if so, how much? Is there a minimal amount (e.g., enough to cover duplication, postage, and materials) or perhaps enough for some paid advertising and professional assistance?



But money is not the only factor, and it may not even be the most important one. People, facilities, equipment, materials, and the less tangible human contribution of skill, spirit, and reputation can more than compensate for limited funding when it comes to recruitment.

Do you (or people to whom you have access) have **skill** in such areas as art, photography, graphics, copywriting, editing, communication, or PR? Are there people who can simply contribute some time and effort (make phone calls, stuff envelopes)?

Do you have access to the **facilities and equipment** needed to prepare promotional materials (e.g., typewriters, copy machine, print shop, photo lab, or mailing center)? Are **supplies** available to you (e.g., paper, art materials, display setups, envelopes)?

Do you have access to **background material** (e.g., a good reference library, specialized marketing references, demographic materials, mailing lists, lists of former students)? Do you have internal access to **promotional avenues** (e.g., a newsletter, a campus newspaper, a regular radio or TV spot, a catalog, a regular promotional mailing financed by the organization, bulletin board space, or table space at a conference display)?

And don't make the mistake of thinking only in tangible terms. There are intangible, **personal assets** that have great value (that are, in fact, quite necessary) in recruitment. Your own enthusiasm and dedication, for example, are vital to successful promotion. Can you also count among your assets such attributes as dependability, organizational ability, integrity, and high standards of work? Are you a stickler for detail? Do you have a creative imagination? Have you developed a reputation for courtesy and fair play? Do you operate in an atmosphere of goodwill? Does your organization have a good reputation?

And what about **other people**? If you have been around awhile, you may have some "friends in the right places" who can be helpful in promoting your program—people in the media, employers, other educators. If you can count a lot of satisfied people among your former students, you have one of the greatest assets possible for promoting your program, for nothing sells a product like a satisfied customer.

Sample 4 presents a checklist of promotional assets to be considered in developing your recruitment plan.

SAMPLE 4

PROMOTIONAL ASSETS CHECKLIST

	Yes	No	N/A		Yes	No	N/A
1. Monetary Support				d. Photo lab	☐	☐	☐
a. Light (e.g., for duplication, postage, materials)	☐	☐	☐	e. Art/layout equipment	☐	☐	☐
b. Moderate (e.g., for the less expensive forms of advertising, commercial printing, mass mailings)	☐	☐	☐	f. Mailing center			
c. Heavy (e.g., for the most costly forms of advertising)	☐	☐	☐	Collating	☐	☐	☐
d. Indirect (e.g., funded positions)	☐	☐	☐	Stapling	☐	☐	☐
2. Skill				Envelope preparation	☐	☐	☐
a. Art	☐	☐	☐	Mass mailing (e.g., zip coding, sorting)	☐	☐	☐
b. Photography	☐	☐	☐	g. Telephone	☐	☐	☐
c. Graphics, layout	☐	☐	☐	h. Access to 800 number or WATS line	☐	☐	☐
d. Copywriting, editing	☐	☐	☐	i. Other	☐	☐	☐
e. Public relations	☐	☐	☐	4. Supplies			
f. Telephoning	☐	☐	☐	a. Office supplies	☐	☐	☐
g. Typing	☐	☐	☐	b. Art supplies	☐	☐	☐
h. General help	☐	☐	☐	c. Display setups	☐	☐	☐
i. Other	☐	☐	☐	d. Paper and envelopes (in quantity)	☐	☐	☐
3. Facilities and equipment				e. Other	☐	☐	☐
a. Typewriters	☐	☐	☐	5. Background Materials			
b. Copy machine				a. General reference library	☐	☐	☐
Enlargement/reduction capability	☐	☐	☐	b. Specialized references (e.g., marketing, occupational)	☐	☐	☐
c. Print shop				c. Demographic materials	☐	☐	☐
Printing	☐	☐	☐	d. Mailing list	☐	☐	☐
Collating	☐	☐	☐	e. Lists of your former students ..	☐	☐	☐
Folding	☐	☐	☐	f. Alumni lists	☐	☐	☐
Cutting	☐	☐	☐	g. Out-of-town telephone directories	☐	☐	☐
Stapling	☐	☐	☐	h. City directories	☐	☐	☐
Binding	☐	☐	☐	i. Catalogs, promotional materials of competitors	☐	☐	☐
Envelope addressing	☐	☐	☐	j. Organization directories	☐	☐	☐
Envelope stuffing	☐	☐	☐	k. Periodical/journal collection ...	☐	☐	☐

	Yes	No	N/A		Yes	No	N/A
l. Media directories.....	☐	☐	☐	c. Organizational ability.....	☐	☐	☐
m. Other	☐	☐	☐	d. Integrity	☐	☐	☐
6. Internal Promotional Avenues				e. High standards of work	☐	☐	☐
a. House organ	☐	☐	☐	f. Reputation for courtesy and fair play	☐	☐	☐
b. Newsletter	☐	☐	☐	g. Goodwill in the media	☐	☐	☐
c. Campus newspaper	☐	☐	☐	h. Interpersonal skill	☐	☐	☐
d. Alumni magazine	☐	☐	☐	i. Fine reputation of the institution	☐	☐	☐
e. Regular radio spot	☐	☐	☐	j. Other	☐	☐	☐
f. Regular TV spot	☐	☐	☐	8. Other people			
g. Institution's catalog	☐	☐	☐	a. Employers	☐	☐	☐
h. Institution's mass mailings	☐	☐	☐	b. Educators	☐	☐	☐
i. Bulletin board space	☐	☐	☐	c. Satisfied students	☐	☐	☐
j. Conference table space	☐	☐	☐	d. Media people	☐	☐	☐
k. Access to PA system	☐	☐	☐	e. Contacts among special groups (e.g., ethnic groups, service organizations)	☐	☐	☐
l. Sports or entertainment event programs	☐	☐	☐	f. Other	☐	☐	☐
m. Other	☐	☐	☐				
7. Personal Assets							
a. Enthusiasm and dedication ...	☐	☐	☐				
b. Dependability	☐	☐	☐				

Analyze the Program for Promotional Potential

In your program description, you should have answered six questions: who, what, where, when, how, and why. In those answers lie the basis for your analysis of promotional potential. What is there about your program that can help you sell it?

Who and what. Consider your target audience in relation to your program content. You may have determined that your audience has particular needs that your program can fill, and this fact might have potential for marketing. For example, let us say that you have determined that your program in geriatric care ties in very nicely with an urgent local need for nursing home staff. It would make sense to use the excellent prospect of employment in your recruitment campaign.

Where. Is there something about the job environment in which the skills will be used that is particularly appealing? Does the program lead, for example, to positions in the beautiful woods of the national park service? to exciting opportunities for on-the-job travel? to a place in the fast-paced world of high technology?

And, taking a different view on location, where will the program itself be held? Does the location have market appeal? This usually depends on the type of program and the intended audience. For example, for people who have transportation problems, nearness of the program to their home may be important. For other people, the prestige of a location might matter. For industry trainees, the convenience of on-site training immediately before or after their shift could have appeal.

When. If you have planned the program according to the needs of the prospective audience, its timing may also have some promotion potential. For example, you might highlight the fact that a program is offered in an off season (for a trade or profession); in the evening or on weekends (for those with full-time jobs); or during school hours (for at-home parents of school-age children).

How. How the program will be presented—the format, type of training, instructional method, program staff—may be a selling point. That a word-processing course involves extensive practice on the latest equipment, for example, would probably have market appeal. That adults in the class will work together to select practice activities that are relevant to their own situations could help to get across the point that a program is really adult-oriented. There are probably many other “how” features you can think of—well-known speakers, interesting field trips, highly regarded instructional methods, or others—that might interest adults.

Why. Finally, why should adults enroll—or what else makes the program attractive or makes enrolling easy? What support services, registration processes, benefits, and accommodations have you identified or made available to adult learners? What extras go along with the program? In other words, how have you packaged the program for adults?

Determine the Promotional Mix

The promotional mix is the special combination of materials, media, and methods that will work best to promote your particular program. The right promotional mix for your program will be influenced by several things:

- Promotional assets and costs
- Nature of the market
- Nature of the program
- Stage of the program's life cycle

Let's look briefly at how these four factors are considered together to determine the promotional mix.

Promotional assets. Assets, as we have seen, include funding, people, facilities, equipment, personal assets, and anything else you may have that can help you recruit students. You should have a pretty good idea at this point what your assets are, and that is a good place to start.



Naturally, you should take advantage of your resources, whatever they are, and not plan promotional strategies that require resources you simply don't have and can't get. Assume, for example, that you have an in-house print shop that will produce materials for next to nothing. In that case, it would make sense to consider print materials—brochures, pamphlets, fliers, press kits, or whatever else fits your program and audience—as part of your promotional mix.

If you have a big budget for promotion, you might consider paid advertising. If not, you will probably look for inexpensive or cost-free strategies. But again, don't make the mistake of thinking that advertising necessarily has to cost a lot of money. There are many ways to inform the public about your program that cost little or no money. These and others will be discussed in a later section of this information sheet.

Promotional costs. Whether you can afford a particular promotional strategy depends on how much it costs, in monetary, human, or other terms. A variety of promotional strategies for reaching adult audiences are described in the last part of this information sheet. As you consider which of these (or others) are right for your situation, you will need to determine their costs. Costs will vary according to a number of factors—your location, the passage of time, supply and demand, whether you have in-house access or must purchase at wholesale or retail, and so on.

Thus, it pays to cost out each item and to keep your figures up-to-date. Call around. Use the Yellow Pages. Get rate sheets from the post office, the networks, the print shop, the photo lab, the art department, advertising departments—everyone with whom you may at one time or another do business. Ask about discounts. Look for “freebies.”

Check with publicity people in your institution or with the purchasing department; they may have contacts, accounts, agreements, or other money savers. Check with your superiors; there may be interdepartmental agreements or trade-offs you can take advantage of.

Make a list of the promotional strategies available to you. Then use it as a basis for developing a form for recording cost figures for various strategies. For each strategy, you need to identify such cost components as typing, graphics, printing, postage, visuals, commercial fees, and staff time.

Nature of the market. This refers to your prospective audience and what you know about them—geographic distribution, segmentation, concentration, accessibility, and so on. Again, by this point you should know a great deal about your market. For example:

- Who they are
- Where they live, work, or congregate
- Whether they read, what languages they use, what they read (e.g., what newspaper sections, magazines, journals, newsletters)
- What radio and television stations they tune to
- What organizations they belong to
- What types of promotion they respond to

You may not know all these things about your market; you may only have an idea—not definitive information—about some of these things. What you do know, however, can help you target your promotional campaign.

For example, if you know that members of your adult market frequent public libraries, community centers, or fast-food restaurants, you might consider putting fliers in libraries, bulletin board announcements at community centers, or placemat advertisements at the restaurants. If you are trying to reach people who need training in English as a second language, you might concentrate on announcements in foreign-language newspapers and on foreign-language radio programs, fliers or posters in ethnic neighborhoods, and personal contact through social or cultural organizations.

Nature of the program. The type of training (content, purpose, length, format, location, and other factors) will naturally affect how it is best promoted. Consider, for example, a professional upgrading course on the one hand and a high school equivalency preparation course on the other. What would work in promoting the first course might scare off applicants for the second. What would work in promoting the second course might seem too unsophisticated to applicants for the first.

If the program is a one-time event and is coming up quickly, you will be looking for strategies with short turn-around time. If you are seeking students for an open-entry/open-exit program, on the other hand, a longer-term promotional campaign will serve your purposes better.

The stage of the program's life cycle. Promotion is not confined to brand-new programs. As long as a program is still being offered, you will probably be recruiting students for it. But the promotional needs of a program usually change over time.

In the **introductory phase**, when a program is new (or when the type of training is new), people may not understand its benefits and may not realize that they need or want it. In this phase, your promotional efforts will need to be aimed, in part, at educating prospective students about the program's existence, purposes, benefits, and desirability. Such strategies as news stories, interviews, information packets, presentations at group meetings, and other ways of providing in-depth information may be useful.

In the **growth phase**, when a program has been around awhile, people know it is there and what it is for. Advertising in this phase should be designed to remind prospective students of the program's existence, that a new session will be starting, and that enrollment may be easier than they think.

In the **saturation phase**, there is a lot of competition out there for the same students. The number of programs in the same content area may have multiplied. In addition, many people have probably already completed the program, reducing the numbers of prospective students. Promotion in this phase usually focuses on why your program is particularly appealing (e.g., success rate of past completers, convenient location and time, availability of extra services).

As you analyze assets and costs, the nature of your market, and the nature and life-cycle stage of your program, you will be able to identify promotional strategies (1) that you have the capacity to carry out and (2) that have the potential for reaching your target audience.

Set up a Schedule

If you are setting up a broad promotional effort, you should plan on at least six weeks' time to prepare and distribute information—more if commercial printers are involved, and even more if using articles or ads in journals (which may operate on anywhere from three to nine months' lead time).

More than likely, there will be instances when you don't have much lead time. Don't despair—those are the times when you will pull out the fast-track strategies to get the job done in whatever time you have. There are things you can do on short notice; but there is much, much more you can do with adequate lead time.

Whether you have a little or a lot of time, you will need to put together a **written** schedule specifying deadlines, priorities, time frames, tasks involved, and who is responsible. A promotion schedule can take any form with which you are comfortable. The following are a few guidelines that may be helpful in scheduling:

- **Do it early.** Resist the urge to put off tasks until tomorrow. In program promotion, sooner is almost always better than later. Don't expect newspapers, radio or TV stations, or other news outlets to "work something in" that they have received at the last minute. They have their own deadlines.

- **Know other people's deadlines.** Find out what day of the week or month, or what time of day they stop accepting new material.
- **Be specific and be firm.** If other people are working with you, get their input. Then set time lines and enforce them. Be specific about other people's responsibilities—what you expect and when you expect it.
- **Always keep your promises.** If you promise a news release at a given time, be absolutely sure you follow through. If you say you will have camera-ready copy to the printer by noon on Wednesday, make it noon, not 4:30. Goodwill and a reputation for dependability are two assets you can build or destroy as you interact with others on seemingly minor details.
- **Keep good records.** This means **thorough** and **organized** records: be able to account for every task, item, and penny; and be able to find the information. Anyone who has ever been on the phone with a person who rustles around in a pile of papers saying, "I know I've got it here somewhere," realizes that this approach doesn't inspire confidence. Besides, you will need good records later in order to evaluate and improve upon your recruitment efforts.

Ways to Get the Word Out to Adults

There are many, many ways to let people know about your program; the ways are limited only by your imagination. As you review the following strategies that may have application to your program, let your own creativity expand upon them.

The Personal Touch

Personal contact is invariably more effective than indirect or impersonal promotional avenues. Nothing sells a program like a satisfied student or a satisfied employer of the student. Fortunately, the most effective means in this case is also the least expensive—at least in monetary terms.

Your activities can be targeted to two major areas: making individuals aware of your program and making groups aware. Strategies include the following.

Yourself. Talk enthusiastically about your program to members of your occupational advisory committee, associates, colleagues, acquaintances,

and prospective students. As you become aware of prospective students, call them. Invite them to visit the class. Explain its goals and benefits, and help them see how easy it is to give it a try.

Present and former students. Students who are satisfied and well trained are a prime marketing tool. Develop a list of students you can ask to serve as references (e.g., "Would you call this prospective student and talk about the program with her?"). Be sure to ask permission of the person to be called beforehand. Related to this general strategy are the following approaches:

- **Employers**—Develop a list of people who have employed your former students. Ask their help in getting the word out about your program. Set goals—for example, that each person will talk to six people a day until the overall promotional goal is met.

- **Employer incentives**—Offer guarantees or one-year warranties on your students' skills as evidence of your pledge to produce well-trained individuals. For example, agree that if a student's skills are found inadequate on the job, he or she can return to the school at no cost and improve his/her skills.
- **Bring-a-friend night**—Set aside a specific class meeting, and invite students to bring friends who are potentially interested in the program. Run the class as usual (be sure it is especially interesting that night!), and set aside some time at the end for discussion or questions.
- **Family activities**—Set up extracurricular activities (e.g., picnics or tours) to which students can bring their families. This type of event has the potential both for recruiting other family members as students and for developing family support for the current student's education.

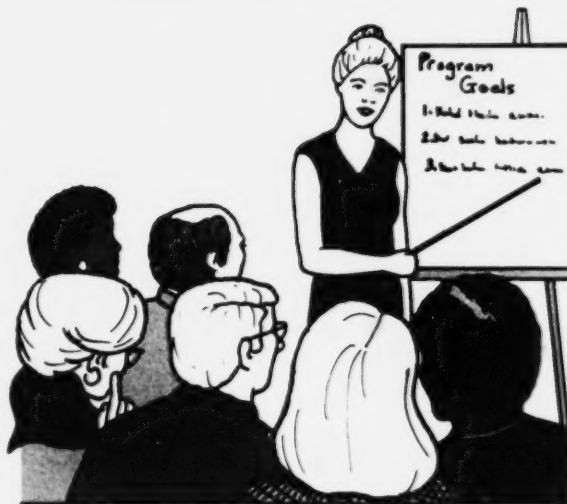
Counselors. Talk to guidance and counseling staff in your institution or in the community, and let them know about your program. Explain for whom the program is intended and what supportive services or other accommodations are available for students. Counselors who are well informed are more likely to advise clients about the training opportunity.

800 number. If your target audience is geographically widespread or if distance learning is part of your program package, you may wish to set up a toll-free 800 telephone number and encourage people to call for more detailed information.

Group presentations. Make personal presentations about your program to small or large groups of people who represent your target audience. These might take the form of planned presentations to organized groups or informal talks or fireside chats to small, impromptu gatherings of interested people.

Existing organizations. Identify groups that have access to your target audience and enlist their aid. Such groups might include organizations already serving the target group; business/industry planning committees; Job Training Partnership Act (JTPA) offices; service organizations; parole officers, if the incarcerated are part of your market; or virtually any other type of group.

Pilot programs. Run a pilot program for a few key people who could later help with marketing. For example, a postsecondary institution might invite the training directors from several firms to participate in



a pilot customized training program. If they are pleased with the program, they could be helpful in selling their companies, or employees within their companies, on the program.

Teach-ins. Give the community a sampling of what is available in the program by holding a "teach-in." An article in a British journal described such a strategy used by a small, independent adult education center known as the Friends Centre.¹ They held a nonstop teach-in for a full week, setting up and offering more than 150 classes taught by over 100 tutors. Community sponsorship was obtained in a manner similar to that used in U.S. walkathons; sponsors each paid for so many hours of the event. More than 4,000 people attended, many of whom had no prior contact with adult education and a high proportion of whom were unemployed.

Brochures and Other Print Items

This category includes all the different types of printed items about your program that you prepare (or have prepared for you) and disseminate. They range from one-page duplicated eye-catchers to glossy publications that provide in-depth information.

Brochures, fliers, and pamphlets. The distinctions among these items are hazy at best. As a group, they are usually simple and designed to serve a limited purpose—perhaps to describe a single occupational area or reach a specific segment of the audience. For example, you might produce a brochure in selected foreign languages if people with limited English proficiency are among your target audience.

1. Annabel Hemstedt and Alan Tuckett, "The Friends Centre Teach-In," *Adult Education*, 54 (September 1981): 156-159.

Attractive brochures can be prepared easily, quickly, and inexpensively. However, because they are so common, people tend to become immune to them. Thus, they must be very well done to be effective. Sample 5 provides some guidelines for developing brochures.

A time-honored way of distributing brochures is by **direct mail**—perhaps a mass mailing once or twice a year and more frequent mailings to carefully targeted mailing lists. The important thing to remember about direct mail as a promotional vehicle is that it is only as good as your mailing lists. They need to be current and made up of people who really are potential students. Sample 6 suggests some sources of mailing lists.

Direct mail is not the only way to disseminate brochures; there are many others. For example:

- Hand out at supermarkets
- Have available at public libraries, senior citizen centers, community centers, sports events, and other adult gathering places
- Print as a placemat and distribute free of charge to fast-food chains
- Print in foreign languages when appropriate and distribute in areas of high ethnic concentrations
- Post on bulletin boards, information kiosks
- Include as shopper throwaways in grocery sacks, "occupant" mailings, door-to-door packets, or newspaper inserts

Promotional packets. Put together packets for key people (e.g., employers, counselors) that include brochures, schedules, impact data, occupational projections, and other information that will help them sell the program to others.

Catalogs. Catalogs usually announce offerings in a number of programs. In addition to a comprehensive annual edition, some programs disseminate a smaller version (e.g., printed on newsprint and sent in the mail) before each new session. The amount of material about any one program is usually confined to a paragraph or two about the content and facts about registration and the schedule.

Promotional newspapers. These are newspapers devoted to promoting the program or institution. They include news items; feature stories; program schedules; and articles about the institution, programs offered, successful graduates, or other matters that have promotional potential. Sample 7 shows the front page of a promotional newspaper that is distributed five times a year. Such papers may be funded through a promotion budget or by selling advertising space in the paper itself.

Outdoor Ads/Displays

Because adults are widely scattered throughout the population, it can be difficult to reach them individually. A good way to gain a lot of exposure for your program is to advertise outdoors or in public places. There are many outdoor/public means of promotion; the following are just a few ideas:

- Ads at bus stops (e.g., on benches or in shelters)
- Signs inside buses or subway trains
- Signs on the exteriors of buses
- Billboards or marquees
- Posters in public places (e.g., parks, sports arenas, airports, shopping centers, libraries, performance centers—but be sure posting is permitted)
- Institutional parking stickers or bumper stickers designed to promote the institution
- Displays set up at adult conferences, conventions, fairs, or career days—staffed by knowledgeable people and stocked with adequate informational materials
- Information booth or kiosk set up at a shopping mall—again, knowledgeable staff and good materials are a must

For some of these schemes, there is an advertising cost (e.g., bus stop benches); for others, there is only the cost of materials and staff time. You should, of course, choose the means and location to suit the program and target audience. For a bus-riding audience, for example, bus cards are a good idea. For people who typically drive their own cars, something else would be more effective.



SAMPLE 5

RULES OF THUMB FOR DEVELOPING AN EFFECTIVE BROCHURE

Appearance

- Make it eye-catching—use an attractive layout, bold headlines, easy-to-follow format, high-quality art or photos (if any).
- Use “white space” to improve the focus and flow. Don’t crowd the copy.

Language and Style

- Use clear, crisp, concise, correct language—no “extra padding,” vague terms or constructs, faulty grammar.
- Use a style that has “punch.” A ho-hum brochure, which has to be read in its entirety to capture one’s interest, will end up in the wastebasket.
- Avoid use of jargon, sexist language, and any terms that are potentially offensive.

Content

- Be specific about the program—what is included, what the outcomes will be, how they will be achieved.
- Be honest—don’t imply a benefit or outcome that is not to be had; don’t hide limitations.
- Be thorough—include as much key information as possible, within the limitations of space.
- Be accurate—check every fact before you include it. Proofread copy several times, and have other people do the same.
- Play up any plusses, any extras, any ways the audience stands to benefit.

Process

- Make it easy to get more information (e.g., a mail-in form or a phone number).
- Make it easy to register (e.g., by phone or mail-in form; using a credit card number).

SAMPLE 6

POTENTIAL MAILING LIST SOURCES

List of current students (e.g., for access to interested friends and family)
List of former students
Alumni directory of your institution
City directory (e.g., to identify neighbors of satisfied students, residents of particular neighborhoods)
Organizations in the field you are serving
Trade associations
Trade directories
Unions
Public libraries (e.g., for lists of local organizations, publications)
Chambers of commerce (e.g., for lists of members, types of industries, other demographic data)
Sales management magazines (e.g., for surveys of buyer power)
U.S. Department of Commerce (e.g., for census reports of population, retail establishments)
Bureau of Labor Statistics (e.g., for types of businesses, employment levels, average earnings)
County and city data books (e.g., for populations, taxes, firms, business establishments)
Mailing list brokerage firms

PROMOTIONAL NEWSPAPER EXCERPT

ADULT EDUCATOR

October, 1983

VOL. 22, NO. 2

Published by the Vocational, Technical and Adult Education Department
School Board of Broward County, Florida

Keeping Your Job May Mean Keeping Up With Your Job

One of our local officials likes to tell the story of how he was late for a very important meeting one morning and was desperately looking for a copy of a letter he had recently written. His secretary was out ill and could not be reached. He knew that during the last six months, all of his correspondence was stored on a little black disc which fit into his secretary's latest office machine, the word processor. As he tells it, "I approached the machine and shouted several times, 'I want that letter!'" All in all, "I knew I was in trouble when the machine didn't respond. Six months ago I could have rooted through the file cabinet until I came across it. File cabinets I understand. Word processors I do not."

That story is just one of many that reflect rapidly changing technology in the workplace, and how it can affect not only how people do their jobs, but also the actual jobs themselves. As in our story, that secretary probably started her career by learning to type, take shorthand, file, etc. before the word processor was even thought about. In the last six months, her whole approach to her job has changed by the introduction of a new office machine.

Many jobs in the marketplace are changing just as in our example, and currently employed individuals will find themselves in the position of having to upgrade their skills just to retain their current position. New technology affects all industries and, therefore, all employees. It can be as minimal as learning a new office procedure to the complete restructuring of a person's job, based on new equipment.

Some changes in jobs have been slight over the year. Driving trucks hasn't changed much, nor has baking bread. Other changes have been dramatic. Not too far in the past, people with mechanical ability could continue in their jobs of auto mechanics quite easily. After all, the principle of the internal combustion engine did not change much. But, with the introduction of microprocessors to control engine temperature, fuel and ignition, auto mechanics took on a new



**The advent of the microcomputer
has given new meaning to the
office and other areas**

gave new meaning to office automation. In the not too distant future, the microcomputer will be as common in the office as the telephone. With its introduction to the office, everyone from top executives to mail clerks will utilize it in the performance of their jobs.

New developments in medicine require that health support personnel must constantly be upgraded in order to keep pace with new medical procedures. In addition, new legislation sometimes requires retraining for people that have held their jobs for years. For example, nurse assistants, those currently employed and those completing training programs, will have to be certified by the state before they can work.

Development of new pesticides, increasing knowledge of soil science, and advancement in procedures for agriculture will require updating of skills for agricultural workers. Changes in tax laws require training of people that prepare income taxes. The same goes for real estate, insurance and securities.

education, with their support, can perform this service at a much lower cost.

These are only a few examples of how existing jobs constantly change, and illustrates the need to keep up with the times.

Vocational education has traditionally been thought of in terms of preparing for a new career. But after the examples cited above, it should be obvious that at some time, vocational education is needed for retraining or upgrading. This is the purpose of supplemental vocational education.

Supplemental programs are designed specifically for the purpose of upgrading persons who are currently, or have been previously, employed in an occupational field. It was recognized long ago that vocational education's role was not only to prepare students for new careers, but serve individuals desiring to keep current or advance in their present jobs. While this serves not only those employees vitally concerned in keeping current, supplemental vocational education helps business and industry to keep

Broadcast Media

Radio and television media are usually associated in people's minds with expensive advertising. However, there are three main types of promotion that take place in the broadcast media: paid advertising, public service announcements, and news coverage. Only the first of these costs money. News coverage is a different type of promotion and will be discussed separately.

Paid advertising. Generally speaking, paid advertising on radio and TV is expensive enough that, as an instructor, you are not likely to venture into it alone. A few generalizations should suffice here:

- Radio/TV advertising is sold as time spots (e.g., a 15- or 30-second spot for a certain price).
- Metropolitan stations charge more than community or special-audience stations, which usually have smaller audiences.
- Time of day affects the cost; prime time costs more.
- Popularity of the program being broadcast affects cost.
- Package deals, with varying time slots, are usually available.
- Advertising rates change with program ratings (ask for the current rate card).

If you are fortunate enough to have a sufficiently large promotional budget to consider this avenue, you should work with your institution's publicity office or an ad agency.

Public service announcements. Most local broadcasting stations have some type of free-of-charge community calendar (what's going on in the community) to help fulfill their obligation to provide a certain proportion of public service programming. These public service announcements (PSAs) are usually tucked in around the edges of the broadcast schedule: very early, very late, and at "dead" times of the day.

You will improve the chances of your notice being aired if you follow the rules of brevity, clarity, and readability. Additional guidelines for PSAs are provided in sample 8.

Print Media

Using the print media for program promotion allows a little more flexibility in the types and number of publications available and the possible approaches.

Types of print media. There are many different types of print media, ranging in scope from local to national. The following is a sampling:

- General-readership newspapers (daily, weekly, and biweekly; national, local, and neighborhood)

- Special-readership newspapers (e.g., ethnic, foreign language, religious, underground, labor-oriented, or campus publications)
- Specific newspaper sections (e.g., news, sports, classified ads, leisure, or education)
- Periodicals—magazines (e.g., general or special interest); journals (e.g., trade or professional); and newsletters (e.g., in-house, vocational, club, organizational, church, special interest, avocational)
- Newspaper supplements
- Souvenir programs for sports and entertainment events, "lineups"
- City guides

You should have identified the types of publications your particular target audience is likely to read, the newspaper sections they habitually turn to, and other readership habits. This information should guide your selection of print media.

Print media approaches. Approaches in the print media include commercial advertising space, notices in the classified ads, free advertising, public service calendar notices, and news coverage.

- **Commercial advertising space**—This is the most expensive of the print media options (although usually less so than in the broadcast media). Procedures vary widely among newspapers, journals, and other publications. You should find out rates, schedules, and formats before you plan on using this type of promotional outlet.
- **Notices in the classified ads**—Whether in newspapers or periodicals, classified ads are relatively inexpensive. If well-targeted, they can be quite effective. For example, a short notice in the personal, employment, education, or similar section of the classifieds (with a central phone number for more information) can reach quite a few people.
- **Free advertising space**—Getting access to free space depends on you—who you can interest in the worthiness of your cause. Some adult educators have been successful in obtaining free space in sports programs, newsletters of service organizations, and similar publications.
- **Public service calendar notices**—These are the print equivalent of PSAs on the airwaves. Similar guidelines apply.

SAMPLE 8

GUIDELINES FOR PUBLIC SERVICE ANNOUNCEMENTS

- **Make it brief** (usually about five typewritten lines, which averages 15 to 20 seconds of delivery time). Gauge of length:
 - 20 words = 10 seconds
 - 60 words = 30 seconds
 - 120 words = 60 seconds
- **Avoid tongue twisters.**
- **Time your announcement by reading it several times.**
- **Type it in capital letters, double- or triple-spaced.**
- **Leave a two- to three-inch margin on the left and a one-inch margin on the right. Head the text "FOR IMMEDIATE RELEASE." Give an expiration date.**

News Coverage

Making news is one of the most creative ways of promoting your program. When you alert the local press to a **human interest story**—about one of your students, for example—you are creating wonderful promotion for your program. The greatest advantage of this type of promotion is that the exposure given to your program is absolutely free.

The key to making news is to be alert to "news" opportunities and to inform the right people in the media. Watch for **issues, controversies, themes**, and other areas of interest already receiving attention in the media that may relate to your program. It helps to try to tie in with those.

Say, for example, that a program teaches the operation of up-to-date electronic manufacturing equipment. The instructor reads a newspaper column about the plight of mature workers facing unemployment because of the abundance of new graduates armed with high-tech skills. That instructor might call and invite the columnist to visit the class and observe "mature" students arming themselves with the new skills.

Another way to tie in with existing issues and themes is to determine what **public service themes** the broadcast media are emphasizing (these are a matter of public record). If your program relates to any themes receiving such emphasis, talk to those in charge of public service broadcasting at the station. They may be interested in fulfilling part of their public service obligation through hosted talk shows or call-in shows featuring someone like you.

There are many other ways to give your program a moment of spotlight in the news. For example:

- **Do something and announce it:**
 - Issue a summary, a report, a protest, a statement
 - Form a committee, appoint someone to a position or office
 - Celebrate something (e.g., an anniversary, a graduation)
 - Take a national report of statistics and apply them to your particular region or occupational area
- **Write a letter to the editor or to a feature columnist**
- **Issue a press release, news release, or article about your program**
- **Give an interview**

Anything that gives your program positive exposure in the media can help your promotional effort.

Sample 9 provides a review of recruitment strategies for adults.

Pooling Your Resources

We have talked about saving promotional costs through word-of-mouth promotion, free advertising, public service announcements, and getting news coverage. There is another way to economize in this business, and that is to pool resources with others.

Look around you. Who else is doing program promotion, either in your institution or in your local area? How do their efforts relate to yours? For example, do you share a common target audience? If so, there may be ways to share costs.

The following are examples of such cost-saving strategies. Some would necessarily involve the cooperation of the administration of each institution, not just selected instructors. However, such joint efforts are sometimes begun because of the interest and creativity of an instructor like yourself.

Piggyback on other mailings. It may be possible to take advantage of mailings being done by your institution or by another organization. If, for example, announcements from another department are being sent to a mailing list that includes members of your market, you might be able to add a page to the mailing without increasing the postage much or at all. (Rule of thumb: six standard sheets—e.g., duplicating paper—in an envelope can be sent with one first-class postage stamp.)

You may also be able to identify groups, whose mission is to serve your target group, that would be willing to include your program information in their regular mailings. For example, a group that serves retired persons might include an announcement of a program aimed at retirees if that program has obvious merit.

Share printing and mailing costs. It may be possible to identify another program with which you can pool resources and to put together a joint catalog or brochure. Sample 10 shows the front page of a joint brochure developed and mailed periodically by the Fairfax County (Va.) Department of Recreation and the Fairfax County Public Schools, Department of Adult and Community Education. This 56-page brochure provides registration procedures and forms and program descriptions for both categories of adult education programs.

Link with other schools in the area. Forming a consortium with schools that have similar goals or target audiences can facilitate coordination of program development and recruitment. Pooling of promotional funds in the consortium can make it possible to economize—perhaps to hire a public relations specialist to handle promotion for all the schools involved. Sample 11 shows an excerpt from a promotional brochure put out as a newspaper supplement by one such group, the Consortium for Continuing Higher Education in Northern Virginia.

SAMPLE 9

RECRUITMENT STRATEGIES REVIEW

Personal

- Word of mouth
- Students as references
- Employers of former students
- Employer incentives
- Bring-a-friend night
- Family activities
- Counselors
- 800 number
- Group presentations
- Existing organizations
- Pilot programs
- Teach-ins

News Coverage

- News items
- Human interest stories
- Letters to the editor
- Feature column coverage
- Press releases
- Interviews

Brochures and Other Print Items

- Direct mail
- Supermarket handouts
- Fliers at adult gathering places
- Placemats
- Foreign language materials
- Bulletin boards, kiosks
- Shopper throwaways
- Occupant mailings
- Door-to-door packets
- Newspaper inserts
- Promotional packets
- Catalogs
- Promotional newspapers

Broadcast Media

- TV ads
- Radio ads
- PSAs

Outdoor Ads/Displays

- Bus stop ads
- Bus or subway signs (inside)
- Bus signs (outside)
- Billboards, marquees
- Posters
- Parking or bumper stickers
- Displays at scheduled gatherings
- Information booth

Print Media

- Newspaper commercial ads
- Journal commercial ads
- Sports program ads
- Entertainment program ads
- Classified ads
- Free advertising space
- Public service calendar notices

SAMPLE 10

EXCERPT FROM JOINT PROMOTIONAL BROCHURE



EXCERPTS FROM A CONSORTIUM-SPONSORED BROCHURE

Guide to Higher Education for Adults in Northern Virginia 1985-1986

- George Mason University
- Marymount College of Virginia
- Northern Virginia Community College
- Strayer College
- University of Virginia
- Virginia Polytechnic Institute and State University

The Consortium For Continuing Higher Education in Northern Virginia 1985-1986

Are you thinking about taking a credit or noncredit course at a college or university? Are you already enrolled at an area college or university? If so, you have entered or are about to enter the mainstream of higher education today. On many campuses across the United States, the part-time adult student outnumbers the traditional full-time 18 to 22-year-old student. You are the new majority in American higher education.

In our rapidly changing society, lifelong learning, in one form or another, is no longer a luxury; it is quickly becoming a necessity. Adults like you are returning to the college classroom in increasing numbers and for a wide variety of reasons:

- To learn new skills and upgrade old ones
- To acquire knowledge for personal or professional purposes
- To prepare for entering or re-entering the employment market
- To qualify for promotion or salary increment
- To change employment fields
- To increase leisure enjoyment

Local colleges and universities are changing to meet your needs.

Consortia Legislation

Through the State Council of Higher Education, the Virginia General Assembly encouraged the formation of six regional consortia throughout the Commonwealth. The consortia not only broaden the base of learning opportunities available to the part-time adult student, but also coordinate member services to eliminate costly duplication.

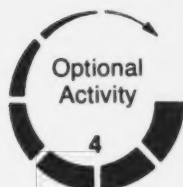


In order to gain an awareness of specific recruitment strategies that have worked with adults in your particular area, you may wish to meet with an instructor of adults in your institution or agency who is experienced in marketing. To help focus the discussion, you may wish to prepare a discussion guide covering such topics as the following:

- Successful and unsuccessful strategies
- Local promotional avenues
- Previously developed samples of recruitment materials
- Sources of information about rates, schedules, formats, etc.



To gain additional skill in using promotional techniques effectively, you may wish to refer to the PBTE modules in Category G: School-Community Relations. Modules G-2 to G-7, in particular, are designed to develop your skill in giving presentations; developing brochures; preparing displays, news releases, and articles; arranging for television and radio programs; and conducting an open house.



To develop competence in developing promotional materials, you may wish to develop one or more of the following promotional pieces about a course or program you are currently teaching:

- Brochure
- Public service announcement or calendar notice
- Poster
- Bus sign
- Program description for a catalog
- Notice for the classified ads

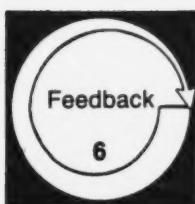


The following items check your comprehension of the material in the information sheet, Recruiting Adults, pp. 31–47. Each of the three items requires a short essay-type response. Please explain fully, but briefly, and make sure you respond to all parts of each item.

SELF-CHECK

1. How does the promotional mix relate to promotional assets and the promotional potential of the program?
2. Assume that an instructor needs to expand adult enrollment in her printing program, but she has **no** direct funding for marketing. What avenues are open to her?

3. How can you be a change agent in recruiting adults, and why might this be necessary?



Compare your written responses to the self-check items with the model answers given below. Your responses need not exactly duplicate the model responses; however, you should have covered the same **major** points.

MODEL ANSWERS

1. Promotional assets are those things available to you that can contribute to your recruitment campaign. They may include people, facilities, equipment, funding, supplies, internal access to promotional avenues, and many other things. Promotional potential consists of the characteristics of your program that can help you sell it—ranging from unique program content or popular speakers to convenient location and available support services.

Promotional mix is the combination of materials, media, and methods you use to “sell” the program. As you determine the best promotional mix for your program, the promotional potential will enter into decisions about **what** to promote, and promotional assets will influence **how** you promote it. You need to take advantage of whatever assets and potential are already at your disposal and to build your recruitment campaign from there.

2. The place to start, when you have no direct funding, is with what you **do** have. In this case, the instructor has print shop facilities. There are, thus, a variety of print-based promotional strategies she can use, including brochures, pamphlets, handbills, fliers, placemats, grocery sack stuffers, and many others.

There are also ways to distribute the advertisements that require time and effort but do not cost money. For example, handing out fliers at supermarkets; supplying them to public libraries, community centers, or fast-food chains; and posting them on bulletin boards are possibilities. It may also be possible to piggyback on someone else's mailing to an adult audience.

The instructor should also take advantage of that most effective—and cost-free—form of advertising: word of mouth. She could enlist the help of satisfied former students and their employers. She could talk to her occupational advisory committee, colleagues, acquaintances, counselors,

JTPA and employment offices, and adult organizations about her program and ask them to spread the word that her program serves adults.

Finally, she should look for opportunities for free advertising. For example, if her shop prints the program for a local sports club, perhaps its sponsors would grant some free advertising space. There are other promotional avenues as well that don't require direct funding. With enthusiasm, a good program, willing helpers, and creativity, she could put together a varied and effective promotional package without a budget.

3. In order to recruit and retain adult learners, you may need to help make changes occur in several areas: awareness, attitude, and barriers.

For people who are unaware of your program and what it has to offer, you will need to disseminate information. With an effective recruitment plan, you can make sure that the right information reaches the right people, in the right way, at the right time, and in a manner that they will understand and respond to.

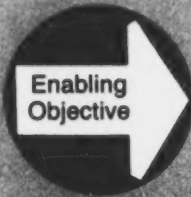
Some people have negative attitudes (e.g., fear or antagonism) about education. You can help change such attitudes (1) by structuring your program so that it reaches adults on an adult level and takes into account individual learning needs and (2) by monitoring students' level of satisfaction and responding appropriately. You can also effect change by reaching out personally to try to understand and alleviate attitudinal barriers.

Finally, for those who encounter barriers to taking part in the program—such as problems related to child care, finances, health care, transportation, or facility with the English language—you can help change the situation by offering supportive services and policies and making them known to prospective students.

Level of Performance: Your written responses to the self-check items should have covered the same **major** points as the model answers. If you missed some points or have questions about any additional points you made, review the material in the information sheet, Recruiting Adults, pp. 31–47, or check with your resource person if necessary.

Learning Experience IV

OVERVIEW



Given a marketing base synopsis, program description, and recruitment plan, critique the program description and recruitment plan.



You will be reading the Marketing Base Synopsis, p. 54.



You will be reading a Program Description, p. 55, based on the marketing base synopsis, and critiquing that description.



You will be evaluating your competency in critiquing the program description by comparing your completed critique with the Model Critique, p. 57.



You will be reading a Recruitment Plan, pp. 59–60, based on the marketing base synopsis, and critiquing that plan.



You will be evaluating your competency in critiquing the recruitment plan by comparing your completed critique with the Model Critique, p. 61.



Read the following marketing base synopsis, which includes (1) sources and strategies used by a hypothetical instructor to obtain marketing information for an adult education program and (2) a summary of the information obtained.

MARKETING BASE SYNOPSIS

The adult education program to be offered is Travel Agency Operations. The program is not a new one; a large proportion of the students have been new high school graduates, with a few returning adults in the class. The instructor seeks to expand the enrollment of adults in the program through a marketing campaign aimed directly at adults. The instructor set up a market information system that included the following sources and strategies:

- **Yellow Pages:** Identified local employers.
- **Travel agencies:** Interviewed personnel about job duties, requirements, job opportunities, working conditions.
- **Job Service:** Spoke with employment interviewers regarding the demand for workers in travel agencies.
- **Adult population:** Conducted a general survey at three locations (two shopping malls and an airport). The form was designed to determine respondent's degree of interest in various program offerings and to obtain demographic data about the respondents.
- **Students:** Asked present adult students how they learned of the program and what about the program interested them. Called former adult students to obtain the same information.
- **School:** Talked with personnel in the adult counseling center and in the student services, guidance, and continuing education offices to determine what services and supports are available to adult students.

From these sources and strategies the instructor collected the following information.

Labor Market Information

- There are quite a few travel agencies in the nearest metropolitan area, only a few in the local area.
- There is a moderate demand for workers in this occupation in the metropolitan area, primarily due to turnover; proportionately less demand in the local area.
- Virtually all job openings are at entry level. The applicants with the best chance of getting hired are those with additional skills and experience

(particularly use of computers and fluency in more than one language). Strong interpersonal skills and maturity weigh heavily in one's favor.

- Advancement is limited within agencies, and this accounts for much of the turnover, as people leave to better their situation.

Student Information

The following groups in the local area expressed interest in the travel agency program:

- Unemployed or employed in low-paying jobs
- Both male and female (although more were female)
- Mothers with school-age children
- Mothers of grown children
- Typists, file clerks, other officer workers without extensive training or seniority
- Spouses of graduate students, many of whom are from other countries

Former students had heard about the program:

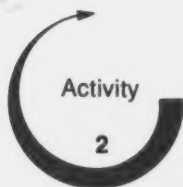
- From friends
- Via newspaper ads
- Via mailed announcements

Interested people are geographically dispersed, although there seems to be a concentration in the campus married student housing district and in lower income rental neighborhoods.

Institutional Support Information

The following accommodations and services of special interest to adult students are available from the educational institution and/or community:

- Financial assistance
- Credit card, telephone registration
- Evening and weekend class schedules
- ABE and ESL programs, which may be taken concurrently with other programs
- Adult counseling center
- Bus service linking the class site with most lower income neighborhoods



Read the following program description for a program intended to serve the adult market defined in the marketing base synopsis. As you read the program description, try to determine its good points and its bad points. Then **describe in writing** the strengths and weaknesses of the program description and how you would improve it.

PROGRAM DESCRIPTION

Travel Agency Operations is designed to give students the basics of selling travel. The objective is to develop the skills necessary to assist the customer in planning many different kinds of vacation or commercial trips. The course is primarily for the person who has no previous experience or knowledge of the operation of a travel agency.

The topics that the students will cover relate to the skills that most employers would like entry-level employees to possess. Students will learn how to use the domestic and international air guides, issue airline tickets, use hotel guides that show the right place to stay, make reservations in hotels anywhere in the world, and read tour manuals and brochures.

Other topics include flight schedules, airline and city codes, travel geography, package tours, travel and baggage insurance, and an in-depth look at the

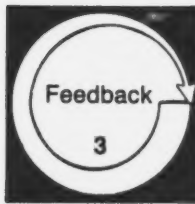
cruise industry, including deck plans, cruise folders, fares, and accommodations on a variety of the most popular luxury cruise liners. Also included are an airline computer "hands-on" workshop, field trips, and seminars.

All materials used by the travel agency in their day-to-day work are supplied free of charge.

Classes begin October 4 and continue for nine weeks. Three different schedules are available, each including two 3-hour classes per week: MW 9:00 a.m.-12 noon; MW 7:00-10:00 p.m.; and TTh 9:00 a.m.-12:00 noon.

Registration may be made in person, by mail, or by phone (299-4981). Fee: \$25. Major credit cards are accepted.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



Compare your written critique of the program description with the model critique given below. Your response need not exactly duplicate the model response; however, you should have covered the same **major** points.

MODEL CRITIQUE

The program description is fairly complete, in that it includes the program objectives, instructional areas covered, and—with variable thoroughness—important features of the program.

The strongest features are the **what**, **when**, and **how**: the description of course content, instructional strategies, and schedule. One gets a pretty good idea of what to expect from the program itself. The description is also clearly written and of a reasonable length.

The weakest features have to do with the **where** (labor market information), the **why** (supportive services and saleable program characteristics), and the **focus**.

The description tells us that the program is intended to prepare people with no previous experience or knowledge for entry-level work in a travel agency. This, while accurate, is unfortunately vague (and perhaps misleading) considering that a good deal is known about the limited local labor market and potential for advancement. We have few clues about where the person who completes the training will fit in a travel agency (what is entry level?) and what his or her prospects for employment and advancement are likely to be.

Similarly, too little attention is given to the variety of supportive services that would appeal to an adult audience. For example, given that spouses of foreign graduate students are part of the target audience, the fact that foreign languages are an asset and that ESL is available would be quite pertinent.

This, however, is only part of a larger problem with the program description. A focus on adult learners is oddly missing. If the intention is to expand adult enrollment, the program description should be directed specifically at adults—why the program would interest **them**.

It might note, for example, that the flexible schedule is tailor-made for employed people and parents. It might mention that adult counseling and financial assistance are available. It could certainly highlight the fact that maturity and interpersonal skills are special assets in this field. In fact, giving the program description such a focus might also add an element of interest and appeal to an otherwise dry description of a potentially interesting program.

Level of Performance: Your written critique of the program description should have covered the same **major** points as the model critique. If you missed some points or have questions about any additional points you made, review the material in the information sheet, *Developing a Program Description*, pp. 20–25, or check with your resource person if necessary.

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Read the following plan for recruiting adult students into the Travel Agency Operations program. As you read, try to determine the good points and the bad points in the plan. Then, **describe in writing** the strengths and weaknesses of the plan and how you would improve it.

RECRUITMENT PLAN

Marketing Role

[Assume that the instructor making this plan is responsible for recruiting students into the program, has authority to proceed toward that goal, and will obtain necessary approvals along the way.]

Assets

Based on the Promotional Assets Checklist, the following assets are available:

- **Monetary support:** Light (e.g., for duplication, postage, materials); must be spread over entire target audience, not just adults
- **Skills:** Cost-free access, through related programs in the institution and own students, to art, graphics, layout, telephoning, typing, and general help
- **Facilities and equipment:** Typewriters and telephones; printing facilities, including printing, collating, folding, cutting, and stapling; art/layout equipment
- **Supplies:** Office supplies; art supplies, through the graphics program; paper supply, through print shop
- **Background materials:** Lists of former students (own classes); alumni lists (institution-wide)
- **Internal promotional avenues:** Institution's catalog, bulletin board space
- **People:** Employers (advisory group); satisfied students (past and present)

Promotional Potential

- **Who/What:** Good fit between program and target audience (e.g., foreign graduate student spouses, desirability of foreign language fluency; mature students, desirability of maturity in the field of work)
- **Where:** Appeal of working in field of travel (image of excitement, access to travel bargains, contact with interesting people); location of program

- **When:** Flexible schedule, including days and evenings especially convenient for those who are employed and those who have children in school
- **Why:** Financial assistance, adult counseling center, ESL, ABE, credit card and phone registrations

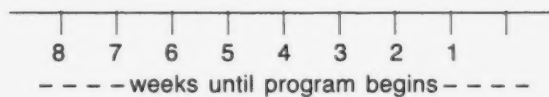
Promotional Mix

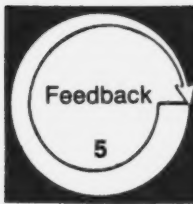
The following strategies are planned to promote the Travel Agency Operations program:

- **Word of mouth:** Promote program among acquaintances, colleagues.
- **Advisory committee:** Enlist their help in spreading the word.
- **Current and past students:** Enlist their help in spreading the word.
- **Bring-a-friend session:** Ask each current student to bring someone to a designated class to observe the program in action.
- **Brochures, fliers:** Print brochures/fliers about the program, aimed at adult learners.
- **Direct mail:** Send brochures out to adults by mail.
- **Bulletin boards:** Post fliers on bulletin boards in married student housing, around campus, and at the counseling center.
- **Handouts:** Hand out fliers at supermarkets close to campus.
- **Bus sign:** Have art department design an internal bus sign to advertise the program.
- **Radio:** Buy a 30-second advertising slot on the radio to promote the program.
- **News coverage:** Try to interest local papers or columnists in doing human interest story about a current student, wife of an Egyptian graduate

student, who speaks both her native language and French and is taking ESL classes along with Travel Agency Operations program; hopes to use combined skills when they relocate in native country or elsewhere.

• **Schedule:**





Compare your written critique of the recruitment plan with the model critique given below. Your response need not exactly duplicate the model response; however, you should have covered the same **major** points.

MODEL CRITIQUE

The recruitment plan includes all the major elements: role, promotional assets, promotional potential, promotional mix, and schedule. The **assets** seem to have been thoroughly examined (one would hope that the instructor has an exact figure on the amount of monetary support for promotion).

The **promotional potential** also seems well thought out, except for the omission of the "how" factor. The **how**—program format and instructional methods (computer hands-on workshop, field trips, seminars, and so on)—have good potential for appealing to prospective students and could be used to help promote the program.

The **promotional mix** is where the plan begins to show some real weaknesses. There are many good ideas about recruitment strategies in this part of the plan, and if all were carried out, the campaign would indeed be far-reaching. Unfortunately, there is more imagination than attention to practical detail here, for the plans are just too vague.

The most troublesome area of vagueness is **budget**. There is no breakdown of costs associated with each strategy. Thus, the instructor cannot gauge which efforts the "light monetary support" will cover. For example, one might assume that a 30-second radio spot would be beyond reach of such a budget, whereas a public service announcement and a classified ad (which were overlooked) might be both affordable and effective. And bus signs? Again, one cannot tell. Without knowing how much these strategies would cost, we don't know if they are economically feasible.

Level of Performance: Your written critique of the recruitment plan should have covered the same **major** points as the model critique. If you missed some points or have questions about any additional points you made, review the material in the information sheet, *Recruiting Adults*, pp. 31–47, or check with your resource person if necessary.

Fortunately, quite a few strategies are planned that either are free, make use of internal resources, or are apt to cost very little. The human interest story seems to have real potential (whereas the bring-a-friend session might not reach adults at all, since most of the current students are just out of high school). But even the descriptions of these strategies would profit from greater detail.

For example, how will advisory group members and students be asked to spread the word, and to whom? Whomever they happen to bump into? Specific target groups? To whom will brochures be mailed? A broad "occupant" mailing could easily exceed the budget and net few returns. A properly targeted mailing to a limited audience, on the other hand, could reach the right people for less money.

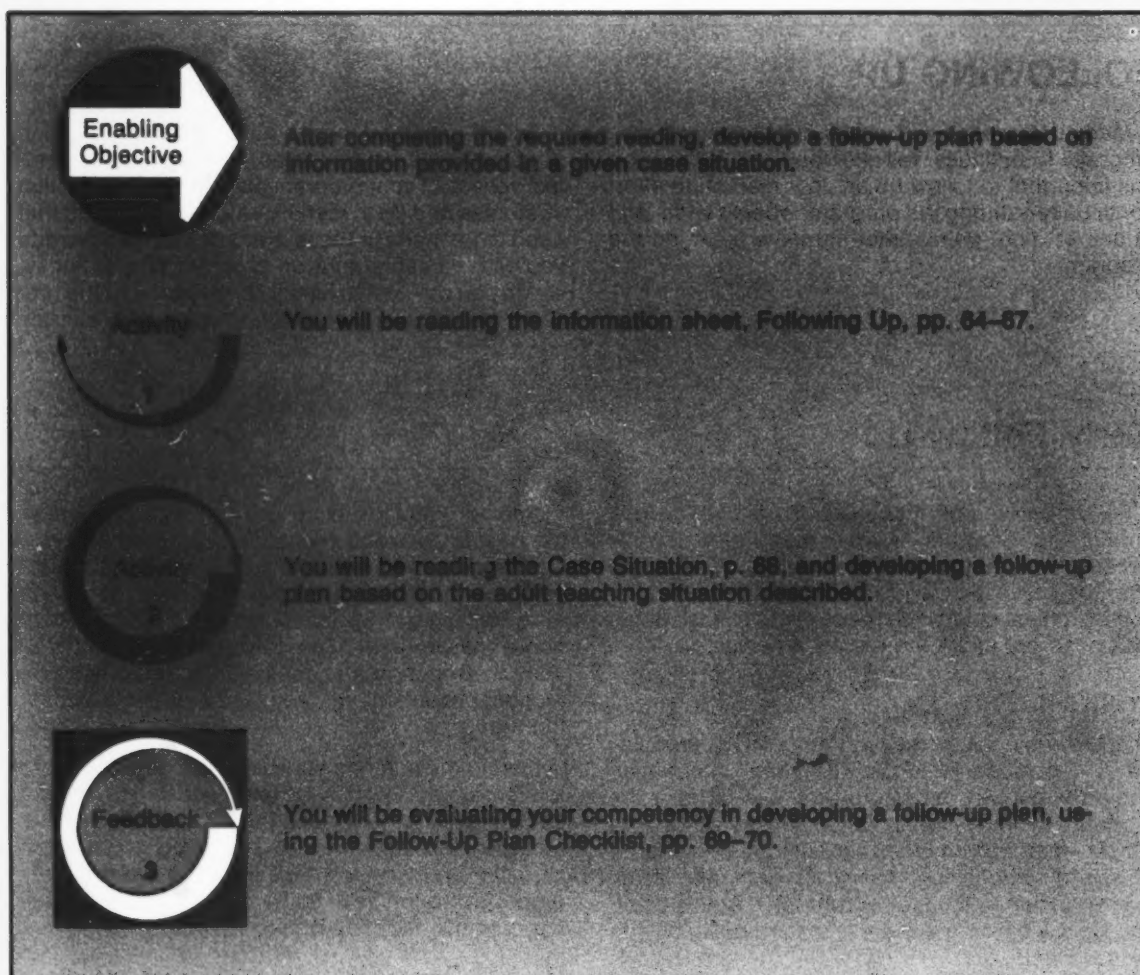
The **schedule**, too, lacks detail. What steps are involved in each task? Who will be involved, and in what way? How does the schedule dovetail with other organizations' schedules? One suspects, for example, that the promoter may not know much about the procedures, policies, and deadlines of the radio station, bus company, and newspaper. They should be called first, to determine whether using them for promotion is even feasible.

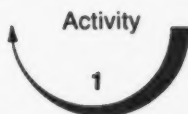
All in all, the recruitment plan is a good first step. However, it needs to be fleshed out, in terms of costs, steps, responsibilities, and operational details, before it can function as a working plan. The instructor might do better to choose fewer strategies and devote energy to more thorough planning on a smaller scale.

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Learning Experience V

OVERVIEW





In any educational marketing effort, it is important to follow up—to determine how successful you have been and how you can be more effective the next time around. For information on the focus of and procedure for carrying out an adult follow-up study, read the following information sheet.

FOLLOWING UP

Marketing doesn't end when adults register for the program. It continues well after they walk in the door. It is important to follow up on your marketing effort continually—during the program, when it ends, and at one or more points after students have left the program.

Follow-up is vital in marketing an adult education program, because it enables you (1) to judge the effectiveness of your program planning and promotion strategies and (2) to identify any improvements that need to be made in those areas. It can also provide you with valuable data on program effectiveness, which can be used to justify continuation of the program and to enrich your future marketing efforts.

Early Follow-Up

Follow-up is somewhat easier to conduct early—during the program—rather than later, simply because you have access to the students (whereas after they have left the program, you have the additional problem of locating them). But the ease of the task does not make the results any less useful.

Program Start-Up

At the beginning of the program, you will probably be asking students to provide some information about themselves, which you will use to tailor the program to their needs. Often this is done very simply—perhaps on index cards or on a brief form. This is a natural opportunity for gathering some follow-up data related to **recruitment**. At this point, you will be seeking answers to such questions as the following:

- How or where did you learn about the program?
- What was there about the program that appealed to you or caused you to seek further information?
- What do you hope to achieve through this program?
- What are your longer-range goals, and how does this program relate to them?

You might also obtain **demographic information** as a check on your market information system—that is, to determine whether the people you thought would be interested in your program are in fact those who participate.

Another early follow-up strategy relates to **tracking** registrations and information inquiries. Assume, for example, that in each of your promotional pieces you provided an address, phone number, or tear-off form for registering for or requesting information about the program. You can also devise ways to code the responses so that you can tell which promotional outlets have been successful in reaching the audience.

For example, forms may be color-coded or return mailing addresses may be letter-coded (e.g., Room 101A, 101B, or 101C) according to where the promotional piece appeared. As coded registrations and inquiries are received, you can tally the numbers received through each outlet as one means of gauging promotional effectiveness.

Program Monitoring

During the program, you will be monitoring learner satisfaction, seeking to answer such questions as these:

- Is the program what you expected?
- How well is the program meeting your expectations, and how could it be improved?
- What are the strengths and weaknesses of the program?
- Are you having problems that are interfering with your participation or success in the program?

This kind of information may be obtained on paper, through group discussion, or through one-to-one contacts, depending on the nature of the questions and the preferences of your students. An easygoing group of people might respond well to a casual question, posed to the group. For example, "How do you feel the program is going at this point—are you getting out of it what you had hoped?" Other people might prefer to put their responses on paper and turn them in privately.

On the other hand, when an individual stops coming to class, a personal phone call may be in order to find out the nature of the problem and whether something can be done to alleviate it. When individuals choose not to return, you will want to know why. Was it dissatisfaction with the program, unrelated personal matters, or other reasons?

For example, an adult who dropped out of an ESL program might have become discouraged with his slow progress, might have lost his source of transportation, or might have gotten sick. Conversely, he or she might have met his/her personal

goal of learning enough English to pass the written driver's test and thus have been quite satisfied with the outcome.

Any such information, whether formally or informally obtained, should become a part of your follow-up records.

Program Completion

At the end of the program, you will probably be asking learners to complete some sort of instrument as part of your overall evaluation effort. You can use this opportunity to include items that relate to their satisfaction with the program. For example:

- How well did the program meet your needs?
- What were its strengths and weaknesses?
- How could the program have been improved?
- Did you encounter barriers or problems that went unsolved?
- If so, what kinds of barriers or problems?
- What other programs would be of interest to you?

Later Follow-Up

The purpose of later follow-up—that which occurs after students have left the program—is generally to gather program impact data, in terms of both quality and quantity. For example:

- How satisfied are program completers?
- How well did the program prepare them?
- How satisfied are their employers?
- How many people have useful skills they didn't have before?
- What side effects or unanticipated outcomes did the program have (e.g., in terms of morale, costs, savings, lawsuits, repeated training, pursuit of additional training, or other factors)?

The follow-up may be **informal and ongoing**—as might be the case in an industry program, in which you could visit the work site and talk to former trainees and their supervisors. This type of situation has real advantages for follow-up because it enables you to get a real feel for how well the training succeeded—in the eyes of both the learner and the employer—without having to track down the former students.

Industry clients tend to be quite interested in both the direct and indirect outcomes of a program, and follow-up can get at both aspects. For example, in following up, the trainers in one industry program discovered that a morale problem had been created by the marketing campaign. The benefits of participating in the program had been very well publicized, but only a small portion of the workers could be accommodated. This caused ill feelings among those who were left out.

Later follow-up might also be a **one-time event** in which you contact individuals (and/or employers) a year or more after they left the program and ask them to respond to a set of questions. Questions usually focus on such matters as job placements, satisfaction with program outcomes, related job success or failure, and interest in future programming.

Follow-up studies in adult education often focus on individuals rather than statistical samples—that is, tracking the progress of specific individuals. For example, there was a problem; we intervened by means of the program package; did we solve the problem? If not, why not?

Whatever strategies you choose, your follow-up efforts should be carefully **planned**. You will need to consider such matters as the following:

- **Objectives:** Precisely what information do you want to obtain? How do you intend to use the information?
- **Methods:** How will you obtain the information? Who will your subjects be (all the students or a random sampling)?
- **When you will conduct the study:** What is your schedule of activities?
- **Content:** Exactly what questions will you ask? How does each relate to your objectives?
- **Budget:** What costs are associated with your methods? How will you pay the costs?
- **Analysis and reporting:** How will you analyze the data? To whom will you report the findings? How will you implement the findings?

When you have developed a plan, it is wise to submit it to your administration before carrying it out.

Strategies

Many institutions and agencies routinely follow up on their "alumni" to determine how well they have been served by the educational program and whether their needs for lifelong learning are being met by the institution. If you teach in such an institution or agency, you can tap into that system. Talk with the people in charge, review the instruments used, and encourage the inclusion of items that serve your needs.

If you, as an instructor, wish to conduct your own follow-up, there are things you can do on a more limited scale to obtain information about the success of your program and your marketing efforts. The following are techniques that may be used for later follow-up.

Personal interviews. Face-to-face conversations with former students allow you to gain a deeper understanding of the situation. You can ask individuals to expand on their answers, and you can observe appearance, body language, and so on. However, personal interviews are time-consuming and may be difficult to arrange.

Telephone interviews. Talking with former students on the phone is another good way to explore their perceptions of past training. Expanded answers and tone of voice can tell you more than written responses in many cases. Whether talking face-to-face or over the telephone, it is often necessary to interview only a sampling of students, rather than every individual, because of the time involved.

Mailed questionnaires. Mailing a survey form is a common way to follow up on the progress of former students. This technique is less time-consuming, but it requires funds for materials and postage. A significant drawback is the fact that many people—most often the lower-level or less satisfied students—do not respond to mailed questionnaires. This may produce misleading results.

You can sometimes increase responses to a mailed questionnaire by helping former students to associate it with you, personally. For example, you might tell students while they are still in the program that they will be receiving such a form at a later date; explain its purpose and the importance of their response. It also helps to precede the questionnaire with a postcard alerting recipients to the fact that the form is coming and urging them to give it careful consideration.²

Locating Students

How do you find former students a year or more after they have left your program? This can be tricky, especially with adults. The only answer, unfortunately, may be overly simplistic: use every means you can think of. Class records, telephone directories, city directories, and similar sources are the most obvious.

If these don't pan out, look to secondary sources—organizations with which they may have identified themselves during the program; current students who may know them; family members you may know of.

Writing "Please forward" on mailings may help get them to their destination. Some instructors pass out "I have moved" cards to students at the time they explain the upcoming follow-up program, encouraging students to let them know their whereabouts if they do move.

2. To gain skill in developing and using mailed questionnaires in follow-up, you may wish to refer to Module A-10, *Conduct a Follow-Up Study*. This module covers steps in planning such a study, provides sample surveys, and explains reporting procedures.

Using the Results

If your follow-up inquiries have been carefully planned, you will have data that will enable you to draw conclusions about the following types of issues with regard to the effectiveness of the marketing program:

Program Planning

- How well the program meets the needs and wants of the adult audience
- What the strengths and weaknesses of the program are
- What other program topics have potential for meeting the needs and wants of the adult audience in the future

Recruitment

- What strategies were effective in reaching the adult target audience
- What strategies were not effective
- What segments of the adult target audience were not effectively reached

Program Impact

- What percentage of students are satisfied with the results of training
- What percentage of employers are satisfied with the results of their employees' training
- To what extent the program was successful in preparing students for employment, as evidenced by such factors as numbers of job placements, promotions, advancements, and positive work evaluations by supervisors
- To what extent the program benefitted its sponsors (e.g., in drawing students, in saving the employer money through improved production)

Analyzing and Reporting the Results

Students' (and others') responses should be organized according to the issues to be examined, tallied (either by hand or electronically), and summarized in chart form. This helps you to form a broad picture, analyze the results, and discuss the outcomes of the study in a follow-up report.

The purpose of the report is to inform advisory committee members, administrators or managers, employers, or other interested readers of the following:

- Program studied
- Objectives of the study
- Methods used
- Conclusions reached

In writing a follow-up report, it is helpful to follow a few guidelines:

- Remember who your audience is, and write with them in mind (e.g., avoid using jargon they won't understand).
- Use plain English, clearly written, without a lot of embellishments.
- Be precise and provide detail.
- Use tables and graphs to present data.
- Include a copy of the survey form or a list of the questions asked.

When presenting a follow-up report, you should be prepared to summarize the results and conclusions orally and to invite discussion of their implications for action.

Next Steps

A follow-up report has real value in two major areas: selling and program improvement. To the extent that your study shows positive results, it can be used as a marketing tool—to "sell" the program to the following groups:

- To future students (e.g., "See how satisfied our former students are")
- To future clients (e.g., "This is how past clients have benefitted")
- To its sponsors (e.g., "Your investment has paid off and merits continued support")

Follow-up results can also point the way to needed changes. You may find, for example, that the recruitment plan needs to be changed. Promotional strategies that aren't working may need to be dropped. Or approaches that have better potential for drawing students may need to be added. Or strategies that are missing the mark may need to be redirected.

You may determine from the study that the program itself is not meeting adult needs as well as you would like. Perhaps you didn't know enough about your audience (you need to improve your market information system); or perhaps your instructional approach needs adjustment.

Whatever your findings, it is vital that the process come full circle. Follow-up findings can serve as an important element in your market information system, helping you in the continuing process of improving, adjusting, revising, and updating your program so that it truly meets the needs of the adult audience.



The following case situation describes a teaching situation. Read the situation and write a follow-up plan based on the information given. Your plan should cover objectives, methods, timing, content, and data analysis and reporting.

CASE SITUATION

The Travel Agency Operations program offered at Boline Technical Center is due to begin next week. This nine-week program prepares students for entry-level employment in a travel agency. The program has been in operation for two years. Until now, it has attracted far more continuing postsecondary students (recent high school graduates) than returning adults (ratio 10:1). The instructor is attempting to expand adult enrollment.

A limited budget for recruitment was granted by the Boline administration, with the stipulation that the outcomes of the program be monitored and reported on an ongoing basis. Reports are to cover those areas required by Boline policy (enrollments, completions, dropouts, grades, employment rates after training, and other measures of program success). The reports must cover the success of the recruitment program as well.

Recruitment

The following strategies were used specifically to recruit adults:

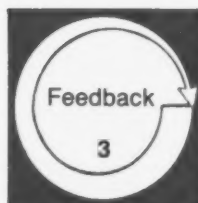
- Each of the six advisory committee members was asked to identify an organization with which he or she would promote the program.
- Former adult students from the past two years were called and asked to promote the program among their acquaintances.
- An open house was held one evening during the previous term, to which interested people were invited to come.
- Brochures were printed and used in the following ways:
 - Mailed to alumni of all adult programs at Boline

- Posted on campus bulletin boards, at public libraries, and in the community center
- Handed out at a local shopping mall and at a recent careers conference sponsored by a local church
- Counselors at the adult counseling center and the local employment office were contacted and given materials about the program.
- A classified ad was placed in the "Instruction" section of the daily newspaper and three neighborhood weeklies.
- A public service announcement was aired on two local radio stations—one with a classical music focus and the other with variable programming.

Enrollments

Preliminary registration information reveals the following registrations for the evening class. Those for the two day sections are comparable in number, proportion, and general profile.

	Occupation	Age
15 continuing postsecondary students	"student"	(17-20)
10 returning adults		
1. Janie Schnelzer	file clerk	30
2. Helen Babbitt	homemaker	47
3. Rocky Kerley	taxi driver	25
4. Ozzie Price	unemployed	39
5. James Cook	grocery clerk	40
6. David Parke	unemployed	34
7. Janoor Indiri	typist	27
8. Holly Banaeker	delivery driver	28
9. Grace Nicosia	unemployed	32
10. Tasneem Nabiba	"none"	26



After you have developed your follow-up plan, use the Follow-Up Plan Checklist, pp. 69-70, to evaluate your work.

FOLLOW-UP PLAN CHECKLIST

Directions: Place an X in the NO, PARTIAL, or FULL box to indicate that each of the following performance components was not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

Name _____
Date _____
Resource Person _____

LEVEL OF PERFORMANCE

Your plan:

	N/A	No	Partial	Full
1. specifies follow-up objectives, including:				
a. purposes to be served by the study	☐	☐	☐	☐
b. questions to be answered by the study	☐	☐	☐	☐
2. outlines the methods to be used, including:				
a. specific strategies to be used (e.g., data cards in class, personal contact, telephone interviews, mailed questionnaires)	☐	☐	☐	☐
b. scope of the study (students to be included)	☐	☐	☐	☐
c. means of locating former students	☐	☐	☐	☐
d. timing of the study	☐	☐	☐	☐
e. detailed schedule of activities	☐	☐	☐	☐
3. includes strategies for obtaining information related to:				
a. recruitment strategies	☐	☐	☐	☐
b. "fit" of program and audience	☐	☐	☐	☐
c. potential topics for the future	☐	☐	☐	☐
d. program impact	☐	☐	☐	☐
4. includes strategies for following up at various times, including				
a. at program start-up	☐	☐	☐	☐
b. during program	☐	☐	☐	☐
c. at program completion	☐	☐	☐	☐
d. a year or more after program completion	☐	☐	☐	☐
5. includes plans for attempting to reach a balanced representation of information sources, including:				
a. employed and unemployed/underemployed former students ..	☐	☐	☐	☐
b. successful and marginal program completers	☐	☐	☐	☐
c. program dropouts	☐	☐	☐	☐
d. employers	☐	☐	☐	☐

	N/A	No	Partial	Full
6. includes a list of the specific questions to be asked	☐	☐	☐	☒
7. indicates the follow-up objective to which each question relates ..	☐	☐	☐	☒
8. indicates plans for data analysis and reporting, including:				
a. methods for summarizing and analyzing data	☐	☐	☐	☒
b. intended audience	☐	☐	☐	☒
c. methods of reporting results	☐	☐	☐	☒

Level of Performance: All items must receive FULL or N/A responses. If any item receives a NO or PARTIAL response, review the material in the information sheet, Following Up, pp. 64-67, revise your follow-up plan accordingly, or check with your resource person if necessary.

Learning Experience VI

FINAL EXPERIENCE



Terminal
Objective

In an actual teaching situation,* market an adult education program.



Activity

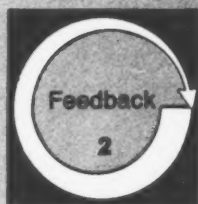
1

As part of your duties as an instructor, market an adult education program. This will include—

- establishing a marketing base
- developing and describing a program
- developing and carrying out a recruitment plan
- following up on your marketing effort

NOTE: Due to the nature of this experience, you will need to have access to an actual teaching situation over an extended period of time (e.g., six weeks or more).

As you perform each of the above activities, document your actions (in writing, on tape, through a log) for assessment purposes.



Feedback

2

Arrange to have your resource person review your documentation, program description, and any promotional materials developed.

Your total competency will be assessed by your resource person, using the Teacher Performance Assessment Form, pp. 73–75.

Based upon the criteria specified in this assessment instrument, your resource person will determine whether you are competent in marketing an adult education program.

* For a definition of "actual teaching situation," see the inside back cover.

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TEACHER PERFORMANCE ASSESSMENT FORM

Market an Adult Education Program (N-2)

Name _____

Date _____

Resource Person _____

Directions: Indicate the level of the teacher's accomplishment by placing an X in the appropriate box under the LEVEL OF PERFORMANCE heading. If, because of special circumstances, a performance component was not applicable, or impossible to execute, place an X in the N/A box.

LEVEL OF PERFORMANCE

In establishing a marketing base, the instructor:

	N/A	None	Poor	Fair	Good	Excellent
1. obtained information related to:						
a. labor market trends	☐	☐	☐	☐	☐	☐
b. prospective students' needs, wants, barriers, preferences, and location	☐	☐	☐	☐	☐	☐
c. institutional supports	☐	☐	☐	☐	☐	☐
2. defined the market	☐	☐	☐	☐	☐	☐
3. segmented the market into smaller groups with common characteristics	☐	☐	☐	☐	☐	☐
4. set up a complete and ongoing market information system	☐	☐	☐	☐	☐	☐
5. developed adequate internal linkages	☐	☐	☐	☐	☐	☐
6. developed adequate external linkages with a variety of individuals and groups	☐	☐	☐	☐	☐	☐

In developing and describing a program, the instructor:

7. packaged the program in response to the marketing base so that the program:						
a. considers students' needs and wants	☐	☐	☐	☐	☐	☐
b. reflects the labor market situation	☐	☐	☐	☐	☐	☐
c. builds on institutional supports	☐	☐	☐	☐	☐	☐
8. developed a program description that included:						
a. goals and purposes of the program	☐	☐	☐	☐	☐	☐
b. instructional areas covered	☐	☐	☐	☐	☐	☐
c. important features of the program (who, what, where, when, how, why)	☐	☐	☐	☐	☐	☐

In developing and carrying out a recruitment plan, the instructor:

	N/A	None	Poor	Fair	Good	Excellent
9. operated within an established role in regard to program promotion and recruitment	☐	☐	☐	☐	☐	☐
10. identified all available assets	☐	☐	☐	☐	☐	☐
11. analyzed the program for promotional potential, including:						
a. relationship of audience and content	☐	☐	☐	☐	☐	☐
b. potential job environment for trainees	☐	☐	☐	☐	☐	☐
c. program timing	☐	☐	☐	☐	☐	☐
d. instructional methods and format	☐	☐	☐	☐	☐	☐
e. support services, policies, and accommodations ...	☐	☐	☐	☐	☐	☐
12. decided on a promotional mix that:						
a. was realistic in relation to assets and costs	☐	☐	☐	☐	☐	☐
b. was appropriate for the identified market	☐	☐	☐	☐	☐	☐
c. was appropriate for the type of program	☐	☐	☐	☐	☐	☐
d. reflected the life-cycle stage of the program	☐	☐	☐	☐	☐	☐
e. included strategies for economizing (pooling resources or taking advantage of free or inexpensive promotion)	☐	☐	☐	☐	☐	☐
13. set up a written promotion schedule that was realistic for the strategies chosen and the time available	☐	☐	☐	☐	☐	☐

In following up on the marketing effort, the instructor:

14. developed a follow-up plan that included:						
a. objectives	☐	☐	☐	☐	☐	☐
b. questions to be answered	☐	☐	☐	☐	☐	☐
c. methods for obtaining those answers	☐	☐	☐	☐	☐	☐
d. procedures for analyzing, interpreting, and reporting data	☐	☐	☐	☐	☐	☐
15. followed up both during and after the program	☐	☐	☐	☐	☐	☐
16. included a balanced representation of students in the follow-up, including dropouts	☐	☐	☐	☐	☐	☐

	N/A	None	Poor	Fair	Good	Excellent
17. obtained data related to:						
a. appropriateness of program for audience	☐	☐	☐	☐	☐	☐
b. effectiveness of recruitment	☐	☐	☐	☐	☐	☐
c. program impact	☐	☐	☐	☐	☐	☐
d. future program topics	☐	☐	☐	☐	☐	☐
18. used follow-up data to improve the overall marketing effort	☐	☐	☐	☐	☐	☐

Level of Performance: All items must receive N/A, GOOD, or EXCELLENT responses. If any item receives a NONE, POOR, or FAIR response, the instructor and resource person should meet to determine what additional activities the instructor needs to complete in order to reach competency in the weak area(s).

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

ABOUT USING THE NATIONAL CENTER'S PBTE MODULES

Organization

Each module is designed to help you gain competency in a particular skill area considered important to teaching success. A module is made up of a series of learning experiences, some providing background information, some providing practice experiences, and others combining these two functions. Completing these experiences should enable you to achieve the terminal objective in the final learning experience. The final experience in each module always requires you to demonstrate the skill in an actual teaching situation when you are an intern, a student teacher, an inservice teacher, or occupational trainer.

Procedures

Modules are designed to allow you to individualize your teacher education program. You need to take only those modules covering skills that you do not already possess. Similarly, you need not complete any learning experience within a module if you already have the skill needed to complete it. Therefore, before taking any module, you should carefully review (1) the introduction, (2) the objectives listed on p. 4, (3) the overviews preceding each learning experience, and (4) the final experience. After comparing your present needs and competencies with the information you have read in these sections, you should be ready to make one of the following decisions:

- That you do not have the competencies indicated and should complete the entire module
- That you are competent in one or more of the enabling objectives leading to the final learning experience and, thus, can omit those learning experiences
- That you are already competent in this area and are ready to complete the final learning experience in order to "test out"
- That the module is inappropriate to your needs at this time

When you are ready to complete the final learning experience and have access to an actual teaching situation, make the necessary arrangements with your resource person. If you do not complete the final experience successfully, meet with your resource person and arrange to (1) repeat the experience or (2) complete (or review) previous sections of the module or other related activities suggested by your resource person before attempting to repeat the final experience.

Options for recycling are also available in each of the learning experiences preceding the final experience. Any time you do not meet the minimum level of performance required to meet an objective, you and your resource person may meet to select activities to help you reach competency. This could involve (1) completing parts of the module previously skipped, (2) repeating activities, (3) reading supplementary resources or completing additional activities suggested by the resource person, (4) designing your own learning experience, or (5) completing some other activity suggested by you or your resource person.

Terminology

Actual Teaching Situation: A situation in which you are actually working with and responsible for teaching secondary or postsecondary vocational students or other occupational trainees. An intern, a student teacher, an inservice teacher, or other occupational trainer would be functioning in an actual teaching situation. If you do not have access to an actual teaching situation when you are taking the module, you can complete the module up to the final learning experience. You would then complete the final learning experience later (i.e., when you have access to an actual teaching situation).

Alternate Activity or Feedback: An item that may substitute for required items that, due to special circumstances, you are unable to complete.

Occupational Specialty: A specific area of preparation within a vocational service area (e.g., the service area Trade and Industrial Education includes occupational specialties such as automobile mechanics, welding, and electricity).

Optional Activity or Feedback: An item that is not required but that is designed to supplement and enrich the required items in a learning experience.

Resource Person: The person in charge of your educational program (e.g., the professor, instructor, administrator, instructional supervisor, cooperating/supervising/classroom teacher, or training supervisor who is guiding you in completing this module).

Student: The person who is receiving occupational instruction in a secondary, postsecondary, or other training program.

Vocational Service Area: A major vocational field: agricultural education, business and office education, marketing and distributive education, health occupations education, home economics education, industrial arts education, technical education, or trade and industrial education.

You or the Teacher/Instructor: The person who is completing the module.

Levels of Performance for Final Assessment

N/A: The criterion was not met because it was not applicable to the situation.

None: No attempt was made to meet the criterion, although it was relevant.

Poor: The teacher is unable to perform this skill or has only very limited ability to perform it.

Fair: The teacher is unable to perform this skill in an acceptable manner but has some ability to perform it.

Good: The teacher is able to perform this skill in an effective manner.

Excellent: The teacher is able to perform this skill in a very effective manner.

Titles of the National Center's Performance-Based Teacher Education Modules

Category A: Program Planning, Development, and Evaluation

- A-1 Prepare for a Community Survey
- A-2 Conduct a Community Survey
- A-3 Report the Findings of a Community Survey
- A-4 Organize an Occupational Advisory Committee
- A-5 Maintain an Occupational Advisory Committee
- A-6 Develop Program Goals and Objectives
- A-7 Conduct an Occupational Analysis
- A-8 Develop a Course of Study
- A-9 Develop Long-Range Program Plans
- A-10 Conduct a Student Follow-Up Study
- A-11 Evaluate Your Vocational Program

Category B: Instructional Planning

- B-1 Determine Needs and Interests of Students
- B-2 Develop Student Performance Objectives
- B-3 Develop a Unit of Instruction
- B-4 Develop a Lesson Plan
- B-5 Select Student Instructional Materials
- B-6 Prepare Teacher-Made Instructional Materials

Category C: Instructional Execution

- C-1 Direct Field Trips
- C-2 Conduct Group Discussions, Panel Discussions, and Symposiums
- C-3 Employ Brainstorming, Buzz Group, and Question Box Techniques
- C-4 Direct Students in Instruction Other Students
- C-5 Employ Simulation Techniques
- C-6 Guide Student Study
- C-7 Direct Student Laboratory Experience
- C-8 Direct Students in Applying Problem-Solving Techniques
- C-9 Employ the Project Method
- C-10 Introduce a Lesson
- C-11 Summarize a Lesson
- C-12 Employ Oral Questioning Techniques
- C-13 Employ Reinforcement Techniques
- C-14 Provide Instruction for Slower and More Capable Learners
- C-15 Present an Illustrated Talk
- C-16 Demonstrate a Manipulative Skill
- C-17 Demonstrate a Concept or Principle
- C-18 Individualize Instruction
- C-19 Employ the Team Teaching Approach
- C-20 Use Subject Matter Experts to Present Information
- C-21 Prepare Bulletin Boards and Exhibits
- C-22 Present Information with Models, Real Objects, and Flannel Boards
- C-23 Present Information with Overhead and Opaque Materials
- C-24 Present Information with Filmstrips and Slides
- C-25 Present Information with Films
- C-26 Present Information with Audio Recordings
- C-27 Present Information with Televised and Videotaped Materials
- C-28 Employ Programmed Instruction
- C-29 Present Information with the Chalkboard and Flip Chart

Category D: Instructional Evaluation

- D-1 Establish Student Performance Criteria
- D-2 Assess Student Performance: Knowledge
- D-3 Assess Student Performance: Attitudes
- D-4 Assess Student Performance: Skills
- D-5 Determine Student Grades
- D-6 Evaluate Your Instructional Effectiveness

Category E: Instructional Management

- E-1 Project Instructional Resource Needs
- E-2 Manage Your Budgeting and Reporting Responsibilities
- E-3 Arrange for Improvement of Your Vocational Facilities
- E-4 Maintain a Filing System
- E-5 Provide for Student Safety
- E-6 Provide for the First Aid Needs of Students
- E-7 Assist Students in Developing Self-Discipline
- E-8 Organize the Vocational Laboratory
- E-9 Manage the Vocational Laboratory
- E-10 Combat Problems of Student Chemical Use

Category F: Guidance

- F-1 Gather Student Data Using Formal Data-Collection Techniques
- F-2 Gather Student Data Through Personal Contacts
- F-3 Use Conferences to Help Meet Student Needs
- F-4 Provide Information on Educational and Career Opportunities
- F-5 Assist Students in Applying for Employment or Further Education

Category G: School-Community Relations

- G-1 Develop a School-Community Relations Plan for Your Vocational Program
- G-2 Give Presentations to Promote Your Vocational Program
- G-3 Develop Brochures to Promote Your Vocational Program
- G-4 Prepare Displays to Promote Your Vocational Program
- G-5 Prepare News Releases and Articles Concerning Your Vocational Program
- G-6 Arrange for Television and Radio Presentations Concerning Your Vocational Program
- G-7 Conduct an Open House
- G-8 Work with Members of the Community
- G-9 Work with State and Local Educators
- G-10 Obtain Feedback about Your Vocational Program

Category H: Vocational Student Organization

- H-1 Develop a Personal Philosophy Concerning Vocational Student Organizations
- H-2 Establish a Vocational Student Organization
- H-3 Prepare Vocational Student Organization Members for Leadership Roles
- H-4 Assist Vocational Student Organization Members in Developing and Financing a Yearly Program of Activities
- H-5 Supervise Activities of the Vocational Student Organization
- H-6 Guide Participation in Vocational Student Organization Contests

Category I: Professional Role and Development

- I-1 Keep Up-to-date Professionally
- I-2 Serve Your Teaching Profession
- I-3 Develop an Active Personal Philosophy of Education
- I-4 Serve the School and Community
- I-5 Obtain a Suitable Teaching Position
- I-6 Provide Laboratory Experiences for Prospective Teachers
- I-7 Plan the Student Teaching Experience
- I-8 Supervise Student Teachers

Category J: Coordination of Cooperative Education

- J-1 Establish Guidelines for Your Cooperative Vocational Program
- J-2 Manage the Attendance, Transfers, and Terminations of Co-op Students
- J-3 Enroll Students in Your Co-op Program
- J-4 Secure Training Stations for Your Co-op Program
- J-5 Place Co-op Students on the Job
- J-6 Develop the Training Ability of On-the-Job Instructors
- J-7 Coordinate On-the-Job Instruction
- J-8 Evaluate Co-op Students' On-the-Job Performance
- J-9 Prepare for Students' Related Instruction
- J-10 Supervise an Employer-Employee Appreciation Event

Category K: Implementing Competency-Based Education (CBE)

- K-1 Prepare Yourself for CBE
- K-2 Organize the Content for a CBE Program
- K-3 Organize Your Class and Lab to Install CBE
- K-4 Provide Instructional Materials for CBE
- K-5 Manage the Daily Routines of Your CBE Program
- K-6 Guide Your Students Through the CBE Program

Category L: Serving Students with Special/Exceptional Needs

- L-1 Prepare Yourself to Serve Exceptional Students
- L-2 Identify and Diagnose Exceptional Students
- L-3 Plan Instruction for Exceptional Students
- L-4 Provide Appropriate Instructional Materials for Exceptional Students
- L-5 Modify the Learning Environment for Exceptional Students
- L-6 Promote Peer Acceptance of Exceptional Students
- L-7 Use Instructional Techniques to Meet the Needs of Exceptional Students
- L-8 Improve Your Communication Skills
- L-9 Assess the Progress of Exceptional Students
- L-10 Counsel Exceptional Students with Personal-Social Problems
- L-11 Assist Exceptional Students in Developing Career Planning Skills
- L-12 Prepare Exceptional Students for Employability
- L-13 Promote Your Vocational Program with Exceptional Students

Category M: Assisting Students in Improving Their Basic Skills

- M-1 Assist Students in Achieving Basic Reading Skills
- M-2 Assist Students in Developing Technical Reading Skills
- M-3 Assist Students in Improving Their Writing Skills
- M-4 Assist Students in Improving Their Oral Communication Skills
- M-5 Assist Students in Improving Their Math Skills
- M-6 Assist Students in Improving Their Survival Skills

Category N: Teaching Adults

- N-1 Prepare to Work with Adult Learners
- N-2 Market an Adult Education Program
- N-3 Determine Individual Training Needs
- N-4 Plan Instruction for Adults
- N-5 Manage the Adult Instructional Process
- N-6 Evaluate the Performance of Adults

RELATED PUBLICATIONS

- Student Guide to Using Performance-Based Teacher Education Materials
- Resource Person Guide to Using Performance-Based Teacher Education Materials
- Guide to the Implementation of Performance-Based Teacher Education
- Performance-Based Teacher Education: The State of the Art, General Education and Vocational Education

For information regarding availability and prices of these materials contact—AAVIM, American Association for Vocational Instructional Materials, 120 Driftmier Engineering Center, University of Georgia, Athens, Georgia 30602, (404) 542-2586